1992 MONITORING REPORT

Regional Municipality of Ottawa-Carleton
Planning Department
February, 1992

#3-30

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Regional Official Plan

Regional Planning Department
Policy and Program Division
February, 1992

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1992 Monitoring Report
Regional Official Plan

TABLE OF CONTENTS

Purpose 1

Report Outline 1

PART 1 : POLICY FRAMEWORK

1.1 OFFICIAL PLAN AMENDMENTS: *thirtysomething and counting* 3

1.2 OFFICIAL PLAN CONFORMITY: *stepping into line slowly* 6

1.3 MAJOR STUDIES : *studies, more studies* 7

1.4 PROVINCIAL INITIATIVES : *a Rae of hope?* 11

1.5 NEW FEDERAL REQUIREMENTS : *environmental concerns* 12

PART 2 : URBAN LAND REQUIREMENTS

2.1 PROJECTIONS: *on track, so far* 15

2.2 LAND SUPPLY : *enough is enough* 16

2.3 BEYOND 2011? *extending the long term* 17

PART 3: DEVELOPMENT TRENDS

3.1 RURAL-URBAN DISTINCTION: *blurring* 23

3.2 GROWTH OUTSIDE THE REGION 24

a) Outaouais - *housing starts jump* 24

b) Eastern Ontario - *steady growth* 25

3.3 STRUCTURE OF URBAN AREAS 25

a) Live-Work Pattern - *making a match* 26

b) Job Distribution - *boom in the boonies* 27

c) Quality of Urban Areas - *substituting quantity?* 29

d) Urban Centres - *a balancing act* 30

3.4 PROVISION OF INFRASTRUCTURE 30

a) Serviced Land - *almost O.K.* 31

b) Villages - *don't drink the water* 31

c) Roads - *cracks are showing* 32

d) Transit 35

PART 4 : EMERGING ISSUES 37

APPENDIX A Amendments to 1988 Official Plan 39

APPENDIX B Urban Land Requirements 1991-2011 41

APPENDIX C Urban Land Requirements 2011-2031 45

1992 Monitoring Report on the Regional Official Plan

The purpose of an official plan is to guide development so the community achieves certain pre-determined objectives. In essence it is a vehicle to answer the question "What sort of region/city/community do you want?".

Regional Council adopted a new Official Plan in July 1988. Since then many changes have taken place: Over 30 amendments have been initiated; new provincial legislation has been introduced or is pending; and considerable development has occurred both inside and around Ottawa-Carleton.

A key reason to undertake regular monitoring is the **Planning Act** requirement for Council to consider the need to review official plan policies within five years of the plan's approval. Since the province approved most of the plan in September 1989, this means a Council decision on whether to review the plan (or parts of it) must be made no later than September 1994. The information summarized in this and subsequent monitoring reports will be an important part of that decision.

Monitoring is essential to evaluating the effectiveness of Official Plan policies, particularly in a period of rapid change. This report, the first to evaluate policies of the new Official Plan, is an "interim" monitoring review. It focuses on the Regional Development Strategy, Part 2 of the Official Plan. A complete monitoring report on all aspects of the Plan will be issued in 1994 prior to the official plan review date.

Purpose

The purpose of the report is to:

1. Measure performance of the Official Plan to date against objectives.
2. Identify trends, recent policies or emerging issues which may affect the goals and objectives of the Official Plan.
3. Explain the role of monitoring and related data collection with respect to the Planning Act requirement for Council consideration of an Official Plan review in 1994.

Report Outline

The report is organized in four parts:

1. **Policy Framework:** Regional Official Plan amendments, conformity of local official plans, major studies completed or underway and new legislation are reviewed and their implications for the Official Plan discussed.
2. **Urban Land Requirements:** reviews land supply and projected demand to the end of the current Official Plan horizon (2011) and explores prospects up to 2031.
3. **Development Trends:** discusses growth in population, housing units, jobs and infrastructure in terms of the Regional Development Strategy.
4. **Emerging Issues:** issues likely to affect Official Plan policies over the next several years.

Part 1 : The Regional Official Plan is a Policy Framework

The Regional Official Plan defines Regional interests and contains Council's objectives and policies for the physical development of Ottawa-Carleton up to the year 2011. Policies on physical development are framed with a broad view to their social, economic and environmental implications and embrace a range of subject areas including urban growth areas, transportation, housing, servicing, and protection of environmental and resource areas.

The Official Plan is a legal document. A municipality cannot undertake a capital project which is inconsistent with its official plan. Local official plans and zoning by-laws are legally required to conform to the Regional Official Plan - in fact, this is the primary means of implementing regional policies. Subdivision and condominium plans as well as local site plans are also mechanisms for implementing the official plan.

1.1 CHANGES REQUIRE AN OFFICIAL PLAN AMENDMENT

Anyone that wants to pursue a project or policy that does not conform to the Official Plan must obtain an amendment to the plan. For example, landowners may request amendments that change their property's designated land use in order to undertake a particular development. The Region itself also initiates official plan amendments to accommodate changes required, say, for transitway extensions or to propose policy changes based on updated growth forecasts.

An amendment to the Regional Official Plan usually takes a minimum of four to six months from receipt of application to adoption by Regional Council. The Planning Act sets out requirements for circulation to affected parties and a public meeting on the proposed amendment which is advertised with at least 30 days notice. Before regional amendments come into effect they must be approved by the Minister of Municipal Affairs, which can take up to nine months additional time. Any appeal to the Ontario Municipal Board (OMB) extends the process - for example, there is currently over a one year waiting period for OMB hearings.

The number of amendments to the Official Plan initiated annually has risen significantly since the new plan was adopted in 1988. A total of 39 amendments have been initiated in the three years since adoption. Another 18 amendments were made to the old plan during 1987 and 1988 when the plan was under revision and would have occurred as amendents to the new plan if it had come into effect sooner. However, this does not mean that the Plan is becoming out-dated, only that Regional Council is responding to a period of rapid change.

Amendments resulted in less farmland, more urban land

Almost 1,000 hectares of agricultural land will be urbanized as an effect of amendments to the 1988 Official Plan. Eighty per cent of the loss occurred with the approval of Amendment 1, permitting expansion of Orleans (below). Another 416 hectares of agricultural land will be lost if pending applications are approved. A more detailed list of amendments and their effect is contained in Appendix A.

Table 1
Hectares of Rural Land Redesignated by Amendments to the Regional Official Plan

Official Plan Designation	Adopted by Council		Pending		Refused by Council	
	loss	gain	loss	gain	loss	gain
Agricultural Resource	-989	0	-416	0	-210	0
General Rural	-381	0	0	112	0	210
Marginal Resource (Restricted)	0	0	0	0	0	215
Mineral Resource	-18	0	0	162	0	0
Natural Environment	0	0	0	0	0	0
Waterfront Open Space	0	0	0	0	0	0
Urban Area	0	1245	0	142	-215	0
Major Community Facility	0	143	0	0	0	0
Total Area Affected	-1388	1388	-416	416	-430	430

Note: the table reports net effect of all amendments to Schedule A; eg. adopted amendments affect 1388 ha, lost from Agricultural, General Rural and Mineral Resource' and redesignated to Urban Area and Major Community Facility Information is current to 27 Jan 92.

Table 2
Amendments by Subject Area

Policy Area	Total	Adopted	Pending	Refused	Initiated by RMOC
Agricultural Resource	11	6	4	1	0
Transportation	9	7	2	0	8
Urban Expansion	4	1	3	0	0
Urban Designations	4	3	1	0	2
Mineral Resource	3	2	1	0	0
Village Servicing	2	2	0	0	1
Greenspace System	2	0	0	2	2
Housing Policy	1	1	0	0	1
At No Cost	1	1	0	0	1
Growth Projections	1	1	0	0	1
Wetlands	1	0	0	1	0
Total	39	24	11	4	16

(data to 27/1/92)

Agriculture and transportation are main amendment issues

Of the 39 amendments approved or pending, 11 entailed a change to an area designated as Agricultural Resource. Nine addressed transitway development or other transportation matters and were largely initiated by regional staff. Overall, 24 amendments have been adopted, 11 are pending and 4 have been refused.

Major Official Plan Amendments since 1988:

a) Amendment 1 - Orleans Expansion

Amendment 1, adopted by Council in Dec 88 and now approved by the province, permits additional development in Orleans subject to satisfactory completion of studies on transportation, servicing, land use and phasing of development. Current proposals are for 11,000 new housing units plus commercial and industrial uses. A follow-up amendment to the Regional Plan is required before development proceeds. This amendment will likely come before Planning Committee later in 1992.

b) Amendment 8 - Palladium

This allows the NHL arena to be built on land previously designated Agricultural west of the Kanata urban area. The subsequent OMB decision upheld the Major Community Facility designation in the regional plan, but limited adjacent commercial development and required the landowner and the Region to withdraw from the West Urban Expansion Study of 7,000 acres of land around the site. The Board concluded that "it is clear that there is simply no need to add to the designated urban area to meet general urban growth for the next 25

to 35 years." However, other landowners in the Kanata-Stittsville area may still file applications for urban designation of their lands which would then have to be dealt with.

c) Amendment 14 - Abandoned Railway Rights-of-Way

Amendment 14, designating abandoned railway rights-of-way for use as future transportation and/or utility corridors, was adopted in Apr 91. Further discussions with CN and CP established that the best means to meet regional objectives would be to draft an agreement for purchase of future abandoned rail corridors. As a result a new amendment has been prepared which will be subject to a further public meeting.

d) Amendment 22 - Growth Projections

Amendment 22 introduced revised (higher) growth projections to 2011 for population, housing, jobs and urban land requirements based on results of the 1986 Census. The amendment is not yet approved by the province.

e) Amendment 23 - Removal of the "at no cost" Policy

Introduced in 1988, the "at no cost" policy stated that Regional Council would not pay for trunk sewer and water services, major roads or transitways for development in four specified areas: the Orleans expansion (Amendment 1), Leitrim, small parts of Stittsville, and development in the Village of Richmond above 1,800 dwelling units. However, the introduction of the Development Charges Act meant that implementation of the "at no cost" policy would be very complex and costly to administer. Amendment 23 removed the policy and extended Official Plan policies for phasing of piped services to areas of new development. The key phasing policy states that trunk services will be provided to the Nepean side of the South Urban Centre (SUC) north of the Jock River and to the Gloucester side of the SUC before any servicing of the former "at no cost" areas. This has not been approved by the province, and requests have been made to refer the amendment to the OMB.

f) Amendment 27 - Regional Housing Policy

ROPA 27 updates the Region's housing policy, Part 6 of the Official Plan, in order to comply with the requirements of the Provincial Policy Statement on Land Use Planning for Housing. The amendment, which was adopted by Council on 23 Oct 91, establishes the Region's interest in housing and provides direction for local official plans on affordable housing, residential intensification, and seniors housing. The policies to encourage residential intensification have implications for residential land requirements in the region, with the shift in emphasis to more compact urban development.

Why so much amendment activity?

- Public interest in and understanding of Regional planning policies and process increased during preparation of the 1988 Official Plan. Some parties who did not get satisfaction during the Official Plan review subsequently applied for amendments (eg. Amendments 1, 9, and 25 resulted from issues which were originally raised at some stage of the OP review).

- Rapid development during the 1980s created its own momentum and expectations of future growth, leading to more requests to redesignate land.

- Revisions to the Planning Act (1983) now require that road widenings and floodplains be included in official plans. Amendments are required to revise these designations as base information changes or is updated.

- Planning for extension of the transitway beyond the original 31 km has been incorporated into the Plan.

1.2 LOCAL OFFICIAL PLANS SEEK CONFORMITY

Under the **Planning Act**, local official plans and zoning by-laws must be brought into conformity with the Regional Official Plan within one year of approval of the Region's plan. Local official plans and zoning by-laws are the principal means of implementing regional policy and their conformity to the Regional Official Plan is essential if the plan is to be implemented. Towards this end, the Act empowers Regional Council to amend local plans or zoning by-laws if necessary.

The province approved the Regional Official Plan more than two years ago but most area municipalities are still in the process of bringing their plans and by-laws into conformity. Most municipalities have combined this process with a major review of the local official plan. While this combination has slowed the process, it likely will result in more comprehensive and current official plans at the local level.

The following table indicates the status of review work in each municipality. Regional Council has the responsibility of approving local official plans, with powers delegated to it from the province, which considerably simplifies and speeds the task of ensuring conformity to the regional plan. The process of local official plan conformity has identified several problem areas where local policies often need revision to conform to regional policies. These are policies for Primary and Secondary Employment Centres, floodplains and related zoning, and special needs housing. These issues will be addressed in future reports when local plans are brought to Planning Committee for approval.

Table 3
Progress on Conformity to the Regional Official Plan

Municipality	Official Plan	Zoning By-law
a) OP adopted by local Council; with the Region for approval:		
Gloucester	New official plan adopted	Will be reviewed when OP approved
Osgoode	New official plan adopted	Will be reviewed when OP approved
Ottawa	New official plan adopted	Review of residential areas underway. Other areas to follow.
Vanier	New policies adopted for floodplain, residential & commercial areas. Others (eg.noise) may follow.	Review in 1992
b) Draft policies prepared:		
Cumberland	Conformity issues subject of specific amendments. Agricultural and commercial policies are adopted.	Following OP work
Goulbourn	Preliminary draft done	Review underway: priority for '92
Nepean	Preliminary draft available	Will be reviewed when OP approved
Rideau	Draft OP issued April 1991	Will be reviewed when OP approved
c) OP in preparation:		
Kanata	Draft to be issued 1992	Review in 1992
Rockcliffe	Consultant to be hired	After OP review
West Carleton	Draft to be issued 1992	To begin in 1992

A particular conformity issue is shopping centre size limits. Regional Council has twice passed motions (9 Nov 88 and 14 Aug 91) requesting Ottawa, Vanier, Nepean, Gloucester and Kanata to amend their zoning by-laws to conform to Regional Official Plan policy. This has not been done, and Regional Council may have to consider whether it is now appropriate to exercise its power under the Planning Act to pass the required zoning by-laws on behalf of the area municipalities. A separate report on this issue will be brought before Planning Committee.

1.3 JOINT STUDIES ALSO SHAPE OFFICIAL PLAN POLICY

The Planning Department is regularly involved with a wide range of studies with other agencies. These are described in the following pages. Implications for official plan policy are noted where relevant.

- **Opportunities for the Future** - Initiated during the last official plan review and completed in Apr 89, the study identified major infrastructure requirements associated with a policy to direct growth to the three urban centres (east, west, south) over the next 50 and 100 years. The study was primarily useful as a vehicle for thinking about the very long term future of Ottawa-Carleton. More rigorous analysis of future growth prospects is required in conjunction with greater awareness of environmental aspects.

- **Rural Servicing Study** - The first phase of this study will be completed Feb 92. It analyzes issues and constraints to rural development on private services in Ottawa-Carleton and adjacent townships. It may result in changes to lot sizes, permitted locations, and other aspects of rural development policy in the official plan.

- **Orleans Expansion** - Detailed planning arising from Amendment 1 is being undertaken by Cumberland and Gloucester. A study to address Regional OP objectives for phasing of development, servicing, housing mix, and employment opportunities is nearing completion and will result in an amendment in 1992 to define major land uses, phasing, and regional roads and transitways.

- **South Urban Centre (SUC)** - A planning study of the River Ridge area east of the Rideau River is underway by Gloucester. The study will lead to an amendment to the regional plan to define land uses, transportation and other policies for development. A similar study of the western part of the SUC will likely be undertaken by Nepean in 1992.

- **Greenbelt Review** - Regional staff sit on the Technical Advisory Committee for this NCC-initiated study of future uses of the greenbelt. The study may help identify corridors through the greenbelt for regional infrastructure, simplifying environmental assessment requirements. If any sizeable amount of urban development is permitted in the greenbelt, there could be major implications for the Regional Development Strategy of the Official Plan.

- **Alternative Development Standards** - In consultation with area municipalities, utility companies, and developers, the Region has defined a set of alternative standards for development (e.g. 16m right-of-way versus traditional 20m) designed to produce more affordable housing consuming less land. A demonstration project will be undertaken in 1992. If the new standards are widely adopted, consumption of urban land will be reduced.

- **Environmental Review** - To begin in 1992, this three-year initiative to review environmental policies in the Official Plan was prompted by several factors:

  – overwhelming public concern about environmental issues.

- policies have not been reviewed in more than a decade. The last OP review did not consider environmental policies since they had just been subject to a long OMB hearing.

- Regional Council motion to develop a conservation strategy.

- the need to implement provincial wetland policy.

- the need to find ways to incorporate environmental assessment at the policy stage of planning.

- ongoing review of the roles of Conservation Authorities.

The **Environmental Review** has two main elements:

- analysis and understanding of ecological processes to assist in identifying priority areas for protection;

- a complete audit of the Official Plan to measure its effectiveness in areas of environmental policy, including transportation policy.

The overall intent is to integrate environmental considerations with social, economic and other considerations in the planning process. Consequently, the review will have implications not only for the Official Plan but for other regional operations.

- **Mineral Resource Policy Review** - To commence in 1992 with the Ministry of Natural Resources (MNR), this study will update official plan policies for Mineral Resource Areas. Last reviewed in the early 1980s, these policies were not changed during the last official plan review and must be revised to meet the provincial Mineral Aggregate Resource Policy Statement.

- **Clyde/Merivale Plan of Development** - a joint study involving the Region, Assaly Corporation, City of Ottawa and the local community, the plan provides for a mixed-use development of seniors housing, family housing, commercial and open space uses. OMB date is set for February 24.

- **Recreation Plan, Marlborough Forest** - funded by RMOC with overall coordination by the Ministry of Natural Resources (MNR), a steering committee comprised of the Region, MNR and Rideau Valley Conservation Authority (RVCA) developed a recreation management plan for the Marlborough Forest to resolve conflicting uses and provide a framework for future recreation initiatives.

- **Interpretation Plan, Marlborough Forest** - identified potential areas for and approaches to natural area interpretation. Steering committee: RVCA, RMOC and MNR; funded by RMOC and MNR; study administration by RVCA. Both the above studies may result in a role for the RVCA in the management of this forest,which is largely owned by the Region.

- **LeBreton/Bayview** - in cooperation with the NCC and City of Ottawa, agreement has been reached on a general concept plan for development of the area. At present, technical studies on stormwater management, sewer servicing and feasibility of air rights development, as well as negotiations on the terms of a land exchange among the governments are underway. In terms of the Official Plan, it may result in extension of the Central Area into at least part of LeBreton, plus some changes to the regional road system.

- **Highway 416/417 Interchange Study** - planning staff are reviewing development potential and policies for areas adjacent to expressway interchanges in the rural area in cooperation with local

municipalities, the Ministry of Agriculture and Food and the NCC.

- **Cumberland Riverfront** - the Township, RMOC and the NCC are jointly studying the feasibility of a recreational trail along the Ottawa River. Completion in 1992.

- **Urban Safety** - Responding to a Dec 91 request from Executive Committee, the Department is examining a proposal for a Women and Urban Safety Directorate. Other departments, municipalities and other agencies will be consulted on their activities in this area and their views on the proposed directorate, its services, and possible options for service delivery.

- **Regional Cycling Advisory Group (RCAG)** - RCAG provides advice to Planning and Transportation Departments on cycling policy, design, maintenance, education, safety and enforcement issues. The fall 1991 Cycling Profile Survey will provide information for development of a comprehensive cycling plan in 1992. The cycling plan will be the basis of an Official Plan amendment providing more detailed policies than currently exist in the Plan.

- **Central Area Transportation Working Group** - staff from the Region, City of Ottawa and the NCC have recently formed a group to study ways to realize their common vision for the central area.

- **AMO Housing Taskforce** - regional staff participated with the Association of Municipalities of Ontario (AMO) in providing feedback to the Ministry of Housing on issues encountered in implementing the province's Land Use Planning for Housing policy statement.

Corporate Studies

Other studies and projects being carried out by other departments or cooperatively between departments, most of which involve the participation of the Planning Department, also have effects on planning in the region.

- **Special Needs Housing and Support Services** - To commence in 1992, this review with Regional Health and Social Services may lead to changes in the policy for special needs housing in the Official Plan.

- **Harmonization of Environmental Assessment Processes (HEAP)** - The purpose of HEAP is to try to reduce overlapping requirements of the federal and provincial environmental assessment processes. Although initiated by regional staff, the committee has representation from all levels of government. The goal is to streamline the process by reducing duplication and incorporating, where posible, EA requirements into the planning process.

- **Geographically Referenced Information System (GRIS)** - has started with workstations connected between Planning, Environmental Services, Transportation and Finance Departments. OC Transpo, Health Department, and Goulbourn Township are scheduled to connect to the GRIS network in 1992. Other departments and municipalities will follow.

  The first priority for GRIS is to load accurate base mapping from the RMOC/NCC joint mapping program. Other short term projects include converting the Planning Department's land use survey and Environmental Services' water and sewer networks. Over the longer term, mapping and databases of property ownership, environmental features and the road inventory will be incorporated.

When operational, GRIS promises to greatly enhance the accuracy and speed of many planning and engineering applications and improve communications among departments and area municipalities.

- **Sewer and Water Master Plan** - Environmental Services Department has recently initiated this study to assess long term requirements for upgrading and extending water, sewer and treatment facilities in the region. Planning staff will be on the steering committee. The study is expected to take about three years to complete.

- **Transportation Environmental Action Plan (TEAP)** - ongoing Transportation Department initiative to raise awareness of environmental effects of travel and to demonstrate the viability of alternative modes of transportation. Currently undertaking a survey of cycling needs and developing Terms of Reference for "mobility centres/transportation gateways". May result in amendment to Official Plan policies.

- **Kanata Town Centre Transit Study** - A Transportation Department initiative to examine long range options for providing transit service to the Kanata and Stittsville areas and short term station requirements in the Kanata Town Centre.

- **Central Area Bus Tunnels** - A feasibility study was completed in 1989 and provided to Regional Council for information. The next phase is an environmental assessment study, anticipated to commence in 1993.

- **Regional Roads Rights-of-Way** - Transportation Department's 1992 budget includes funding for a review of the regional road system. First, the criteria for regional roads will be reviewed. Then, all existing and future regional roads will be reviewed to ensure they meet the criteria for inclusion as regional roads. Lastly, the study will review right-of-way requirements for these roads, taking account of adjacent land uses, roadway level of service, noise mitigation and provision for bicycles. The study will be conducted with input from interested local municipalities, some of which have requested a review of regional road standards.

- **Road Noise Guidelines** - In the fall of 1991, Noise Control Guidelines for new developments near existing and proposed regional roads and transitways were prepared. The guidelines were completed by a consulting firm based on terms of reference prepared by the Planning and Transportation Departments in consultation with local municipal staff. The guidelines will be part of a comprehensive five-point noise control program to be completed by the end of 1992.

- **Snow Disposal Study** - Planning staff participated in the 1990 "Snow Disposal Study for Designated Growth Centres" which examined alternative snow disposal sites in the urban centres outside the greenbelt. The study is being used as a guide for the acquisition and development of new sites.

- **TRANS Committee** - a joint technical committee on transportation planning in the National Capital Region. Staff from regional Transportation and Planning Departments, the NCC, Ontario and Quebec transportation ministries, and regional transit authorities sit on the committee.

- **Healthy Communities** - Regional Council joined the Healthy Communities project in 1989. This national initiative was supported by the Canadian Institute of Planners and Health and Welfare Canada. It recognizes that health is more than the absence of illness, and incorporates all aspects of an individual's quality of life. The Healthy Community model relies on the community identifying issues and a collaborative approach to problem solving. Implementation commenced with an RMOC

internal environmental audit as a first step. This is an ongoing long term project. Although the project began in the Planning Department, responsibility was transferred to the CAO's office in 1990.

- **Solid Waste Planning** - The first step is a fifteen month study reviewing the composition of waste in Ottawa-Carleton. This study is nearing completion and should be available in late Spring 1992. The next phase is to develop a long term waste diversion plan (involving the "3 R's" - reduce/recycle/reuse) for the region. The search for new disposal facilities has not yet begun.

- **Economic Development Taskforce** - created by Regional Council in 1991, the taskforce is charged with preparing the framework for a Strategic Economic Development Plan for Ottawa-Carleton. A report is expected in March 92.

- **Interprovincial Bridge Study** - Regional staff participate in this multi-agency study. Phase II, currently underway, is examining alternative locations for new bridge crossings of the Ottawa River. The study is scheduled for completion in 1993.

The Planning Department is involved with a very wide range of issues involving other departments, outside agencies, and the public. With solutions to problems increasingly requiring multi-disciplinary, multi-agency teamwork, it is clear that we must work together.

1.4 THE PROVINCE MOVES ON WETLANDS, ENVIRONMENT AND OTHER ISSUES IN 1992

New provincial legislation, policy statements and major Ontario Municipal Board (OMB) decisions will require policy responses from Regional Council during its current term.

What is a Provincial Policy Statement?

The province from time to time issues "policy statements" under the Planning Act which define provincial interests in matters dealt with by local and regional planning. Each policy statement is accompanied by a related set of regulations which define more precisely what municipalities are required to do to comply with provincial policy.

To date three Policy Statements have been approved by provincial cabinet:

1. *Mineral Aggregates*
2. *Floodplains*
3. *Land Use Planning for Housing*

Draft policy statements have been issued on a number of other subjects, including agricultural land and wetlands. These have not been formally approved by cabinet, although a 1990 OMB decision on the Eagle Creek golf course development in West Carleton declared a provincial interest applied even though the policy statement on wetlands was only draft.

- **Provincial Policy Statement on Wetlands.** A revised draft issued in November 1991 does not address the concerns expressed by Regional Council regarding the previous draft (June 89). One of the principal problems is that no regulations were issued with the draft, making it difficult to assess its practical implications. However, the policy is expected to receive cabinet approval and, if so, will require all Class 1 to 3 wetlands to be protected in the Official Plan. The required amendment will be developed as part of the Environmental Review.

- **Commission on Planning and Development Reform in Ontario (Sewell Commission).** The Commission is examining all aspects of the plan-

ning process in Ontario and will recommend ways to improve "integrity, efficiency, openness and accountability" in land-use decision-making. Three interim reports are expected; Goals for Ontario (released), the planning process (May 92), and the public-private interface (Sep 92). A draft report is expected at the end of 1992 and a final report in Spring 1993.

The Sewell Commission has the potential to fundamentally change planning in Ontario. Emerging issues have been protection of the natural environment including prime farmland, efficient use of infrastructure (through, for example, higher densities on the urban fringe), and the future role of the OMB.

Several of the draft goals for development issued in Nov/Dec 91 will have important implications for planning in Ottawa-Carleton if they are implemented. Examples are:

- Applications to extend the urban boundary shall be considered only during the five-year review of official plans required by the **Planning Act.**
- Class 1-3 farmland shall only be included in additions to the urban area if it is clear that no practical alternatives exist.
- Development in new areas on the urban fringe should be at least 15 units per net acre (37 units per net ha). This density is about 50% higher than current suburban densities in Ottawa-Carleton.
- Encouragement of intensification, public transit, housing close to employment, mixed use development, affordable housing.
- Use of septic tanks will be prohibited after January 1996, in the expectation that alternatives will be developed.

Staff will be reporting to Planning Committee on developments as they unfold.

- **OMB Palladium Decision.** The Board's order approving Amendment 8 recommended two amendments to the Regional Official Plan:
  - To provide a clear process for considering future Major Community Facilities "sensitive to environmental, agricultural and urban priorities." An amendment is being prepared.
  - To provide "special agricultural buffer policies" for the area adjacent to the Palladium site. The Board also recommended that similar action to strengthen the urban-agricultural boundary near other areas of prime agricultural land be considered. Staff are studying ways to address this.
- **Stormwater Drainage Guidelines.** The Ministry of Natural Resources is expected to issue new guidelines on stormwater management by mid-1992. This will have implications for planning of new areas and possibly retrofitting of existing areas.

These issues will be brought before Planning Committee at the appropriate time.

1.5 "FEDS" INCREASE REQUIREMENTS FOR ENVIRONMENTAL STUDIES

Federal policy on environmental assessment changed in 1984 with the issuance of a new cabinet Order-in-Council. Individual departments are now responsible for implementing the shift toward more comprehensive environmental assessment procedures examining the cumulative impact of all projects proposed in a particular area over the long term.

In Ottawa-Carleton, the NCC is the major landowner and hence the agency most responsible for implementing the policy within Ottawa-Carleton. The NCC's particular concern in the region is the greenbelt, meaning that more lead time is required for approval of transportation and piped services to the urban centres outside the greenbelt and more study and justification of the underlying need for particular facilities. This change in emphasis affects regional policy, requiring us to think longer ahead and take more factors into account.

For the Region, planning of projects is complicated by two environmental assessment processes - federal and provincial - each with different requirements. The HEAP (Harmonization of Environmental Processes, p. 9) initiative will help to coordinate efforts in this area.

• • •

It is clear that environmental concerns are taking increasing prominence among the issues to be dealt with in the new term of Council. As discussed, the ramifications will affect not only the Official Plan but also many other aspects of regional operations. We must adapt to new ways of working without being overcome by the complexity of the issues which must be taken account of. In this regard, initiatives such as the Harmonization of Environmental Assessment Processes (HEAP) hold the promise of developing new ways of managing change in Ottawa-Carleton.

Part 2 :
Urban Land Requirements-
Changes in Population Projections Increase Urban Land Requirements

2.1 HOW MUCH GROWTH BY 2011?

The Regional Official Plan is intended to guide development to the year 2011. Projections of population and other key factors were revised in 1990 based on 1986 Census results and incorporated in the Official Plan by Amendment 22. The new projections represent an 11% population increase over earlier projections for 2011. Although the amendment is not yet approved by the province, detailed estimates of residential land requirements presented in Section 2.2 of this report are based on the new projections since they are the most current.

Table 4
Growth Prospects for 2011

	1988 Plan	1990 Revision
Population	787,000	871,000
Households	339,000	368,000
Jobs	467,000	560,000
Urban Land*	26,100	31,000

* developed land in hectares, including roads

Projections appear to be tracking actual growth through 1991 quite well, although the number of jobs is about 7% below projections due to the recession.

Future growth will probably be increasingly dependent on foreign immigration. For example, 84% of net migration to the region in 1990 was from abroad, compared to 26% in 1986. This will have implications for the Region corporately in terms of delivery of services, and for Ottawa-Carleton as a more multicultural society.

Table 5
1991 Development is Close to Projections

	1986	1991 Projected	1991 Estimated Actual
Population	606,640	664,600	663,000
Households	228,140	259,100	259,100
Jobs	340,820	409,000	379,000
Urban Land	19,400	22,000	21,700
Persons per Household	2.66	2.57	2.56
Housing by type:			
- Singles	41.5%	42.5%	42.7%
- Multiples	23.8	23.9	23.6
- Apartments	34.7	33.6	33.7

Population Projection Shows Aging, Slowdown in Growth

The middle-aging of the post-war baby boom will be the major demographic change during the next 20 years. With virtually all population growth projected to occur in age groups over 40, the rate of growth will decrease through the 1991-2011 period. An aging population will affect the housing market, with demand for fewer single detached units and more apartments projected after 2001. This shift in demand translates into overall higher densities and a reduced demand for land through the planning period.

The supply of residential land is the critical issue in regional planning for future urban land requirements. Housing is the largest single use of land in Ottawa-Carleton, consuming roughly half of all developed land (excluding roads). Compared to the supply of land for commercial and industrial uses, land for housing is also in shortest supply. Any shortfall in the supply of land for housing directly affects Ottawa-Carleton residents by increasing land prices and, consequently, housing costs.

2.2 LAND DEMAND AND SUPPLY TO 2011

Housing demand is based on requirements of the projected population, plus an allowance for vacancy in the rental stock and replacement of demolished units.

Between 1991 and 2011, an estimated 115,000 new units will be required in the region. (Details of this analysis are contained in Appendix B.)

To calculate the amount of urban land needed for new units, the percentage of units to be built on rural land is subtracted from the total. Projections have assumed 10% of all new housing will be built in the rural area. This assumption may over-estimate urban housing demand, since the rural share during the 1980s averaged 12%, compared to 7.2% in the 1971-81 period.

Housing in the urban area can be built on vacant land or through intensification of uses on developed land (i.e. through redevelopment, conversions, and infill construction on small vacant parcels). The need for vacant urban land is calculated by subtracting units built through intensification from the total urban requirement. Since 1984, when monitoring began, intensification has varied from 6% to 26% of total urban housing starts. The analysis of future demand therefore uses three rates falling roughly within this observed range: 10%, 17.5% and 25%.

The net requirement for housing on vacant urban land ranges from 78,000 to 93,000 units depending on which intensification assumption is used (see Appendix B).

The supply of vacant urban residential land includes four components:

1. Parcels in the vacant urban residential land inventory (monitored annually by the Planning Department).

2. Land with planning studies underway in the Orleans Expansion Area and South Urban Centre.

3. Small additions of "Stage 2" urban land in Leitrim and Stittsville resulting from the 1991 OMB decision on the Regional Official Plan, and

4. Major areas inside the greenbelt likely to be developed with a residential component (i.e. LeBreton/Bayview, Clyde/ Merivale, CFB Rockcliffe).

Table 6
Supply exceeds Demand during 1991-2011

	Singles	Multiples	Apartments	Total
Total Supply	49,400	26,700	26,100	102,200
Total Demand	46,000	19,700	19,900	85,500
Surplus Units	3,400	7,000	6,200	16,700
Years of Supply Available (Date of Depletion)	22.0 (2013)	26.2 (2017)	22.3 (2013)	23.0 (2014)

Note: figures based on 'medium' intensification scenario; see Appendix B for details.

Three Years of Surplus Remains after 2011

As shown in Table 6, there is enough vacant urban residential land to provide for housing needs until approximately 2014, based on the medium (17.5%) intensification assumption. Supply is largest for multiples (to the year 2017) and smallest for single-detached and apartments (to the year 2013). However, the supply of land for apartments is more elastic and may be increased through redevelopment activity if demand warrants.

2.3 BEYOND 2011? LAND REQUIREMENTS FROM 2011 TO 2031

Any review of the Official Plan in 1994 must address the question of how far beyond 2011 the Plan horizon should be extended.

The Regional Official Plan is a long range policy document that should cover at least a 20 year period. The need to extend the plan beyond 2011 is directly related to identifying land requirements and planning for the major services that future growth will require. The experience of regional planning since its inception in the 1970s has been that frequently issues well beyond a 20 year horizon must be addressed - for example, pipes must be oversized to allow for anticipated demand within their service life (50 years or more) and transportation corridors should be reserved for the very long term before development precludes their use.

This section looks at urban land requirements between 2011 and 2031 - up to roughly a 40 year horizon - and serves as an early exploration of this issue.

Elderly Will Dominate Population Growth

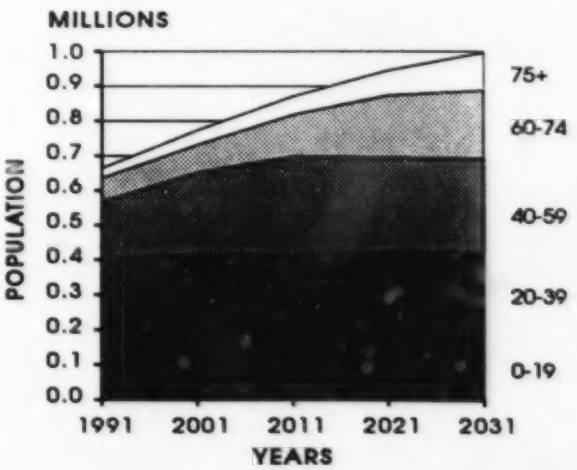
If the 1991-2011 period can be described as the "greying" of the region in demographic terms, post-2011 will see it turn "white". Virtually all population growth after 2011 will occur in the 60 and over age groups.

The Region will have about one million residents in 2031, drawing on any of the three population projections discussed in Appendix C.

Table 7
Population Projections for 2011-31

Assumed Migration	2011	2016	2021	2031
3,000	871,000	896,000	916,000	933,000
5,600	871,000	910,000	945,000	996,000
7,000	871,000	917,000	960,000	1,029,000

Figure 1
Elderly will Dominate Population Growth after 2011



Highlights of 2011-31 Population Growth

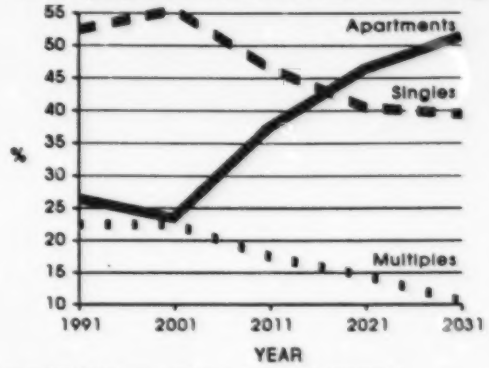
- 60+ population will more than triple, from 97,000 in 1991 to 304,000 by 2031.
- 60+ will comprise almost one-third of the region's population in 2031.
- population under 40 will begin to decrease after 2016.
- 75+ will be the fastest growing group after 2021. Three-quarters of the region's growth after 2021 will be in the 75+ group.
- Deaths will equal births by 2024; by 2031 deaths will exceed births by 2,300 per year.
- Following these assumptions, the population will begin to decrease by about 2040 (varies with migration assumption used).
- Trends in Ottawa-Carleton closely parallel those for the rest of Canada, according to the most recent Statistics Canada projections done in 1991.

Housing: Seniors will be major source of new demand after 2011

More than 80% of new housing demand during 2011-31 will be from households 65 and over. While the total housing requirement will grow by 93,000 units, annual demand will decline with time, from 5,600 units during 2011-16 to 3,900 units after 2021.

Assuming each age group chooses the same type of housing they do now, by 2021 half of the new housing demand will be for apartments, a doubling of their 1991 share. Single-detached housing will comprise 39% of demand, a decrease from its 1991 share of 52%, while multiples will decrease to 11%, half of its current share.

Figure 2
Apartments will be most popular form of new housing



How will future urban land demand be affected?

Beyond 2011, assumptions concerning rural-urban shares and intensification require re-evaluation. Rural living may be more attractive to the increasing numbers of retired households after 2011 and estimates of the rural share have been increased from the previously assumed 10% to 12% (assuming that present servicing problems will be resolved).

With the increase in demand for apartments, from about 25% of the market at present to almost 50% after 2011, a larger proportion of the new demand for housing will have the potential to be accommodated through intensification. While many of the vacant infill sites within the urban area will probably be filled by 2011, new opportunities for intensification may arise as elderly residents seek more convenient housing close to their home community of single-family dwellings, particularly in the urban centres outside the greenbelt.

As in the 1991-2011 period, it is appropriate to use a range of intensification rates. Given the projected increase in demand for apartments and recognizing that apartments are the most adaptable housing type to intensification, the ranges assumed for the 1991-2011 period are increased by 50% for post-2011 estimates.

This results in a range of three rates (15%, 26% and 37.5%) for new units that could be accommodated through intensification after 2011, primarily in apartments integrated into established neighbourhoods.

Working with these revised assumptions, the projected housing requirement indicates a demand of between 1,600 and 1,750 net residential hectares on vacant urban land for the entire 2011-31 period. This represents an annual consumption rate of about half of present-day rates.

Do We Need More Residential Land?

The supply of vacant residential land after 2011 includes the surplus remaining from the 1991 to 2011 period plus any new designations of urban land which Regional Council chooses to add in future years. In addition, potential for additional development in the South Urban Centre (SUC) and Orleans is now designated on Official Plan map schedules.

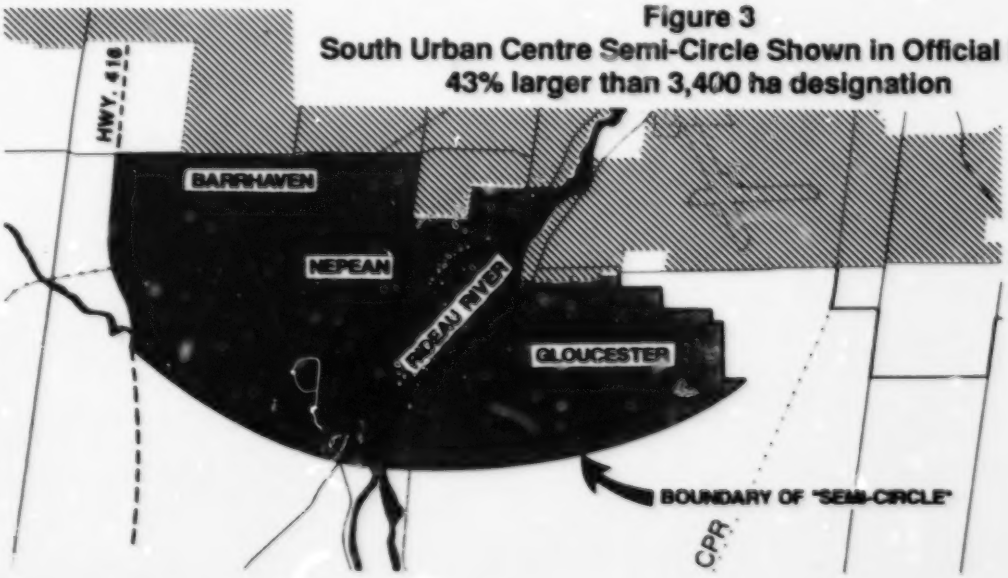
In the SUC additional potential would be provided by complete development of the area shown on Schedules A and B of the Plan. This is discussed in more detail in the following section. In Orleans, there is additional potential for at least 4,500 units above the 40,000 units now permitted in the Official Plan. In neither case would additional urban land have to be designated on Official Plan map schedules, but development potentials permitted in the OP would have to be increased.

Before any decisions are made regarding this potential, planning studies will be undertaken to assess the implications of permitting additional development in these areas relative to other areas within the region. These studies will incorporate a review of sewer, water and transportation servicing needs, development constraints, the appropriate phasing of land for long term use, and other relevant factors. The addition of development potential in these areas will require Council to adopt an Official Plan amendment.

Additional Land in the South Urban Centre

The Regional Official Plan states that 3,400 hectares of urban land are designated in the South Urban Centre (SUC), with a maximum of 33,000 dwelling units. However, the conceptual semi-circle shown on Schedules A and B of the Plan covers a much larger area, measuring about 4,865 ha (Figure 3). The difference between the 3,400 ha stated in the Plan and the

Figure 3
South Urban Centre Semi-Circle Shown in Official Plan: 43% larger than 3,400 ha designation



area of the semi-circle is about 1,465 ha (note that the precise boundaries of the 3,400 ha will be determined by studies still in progress, so it is not possible to map exactly which areas of the SUC are affected). A similar semi-circle was shown in the 1974 Official Plan.

Current planning studies have not examined the larger area in any detail, and it is premature to recommend that the entire area be designated for urban development regardless of any perceived commitment to development of these lands. Results of the supply-demand analysis for urban land summarized below (and detailed in Appendix C) reflect the outcome of including all land within the semi-circle for urban development. As noted, any additions above the current 33,000 unit maximum for the SUC will require Regional Council to adopt an Official Plan amendment.

Land Supply May be Adequate for over 30 Years

Assuming that additional development is permitted in Orleans and the SUC as discussed above, the supply of urban land appears to be adequate to meet demand to about the year 2024, based on the medium intensification scenario. From 1992, this represents a 32 year land supply.

On this basis, it is concluded that no further additions to urban residential land are required at this time to provide for long term growth in the region.

What about Land for Other Uses?

Land is also required for industrial, commercial, and institutional uses, as well as open space and roads. Apart from open space and roads, industrial uses require the most land. The industrial land supply of 2,200 net hectares at the end of 1990 is sufficient to accommodate the 1,000 hectare requirement to 2011 as well as the requirement between 2011 and 2031. This supply does not include sizeable amounts that will be added in the Orleans Expansion Area and South Urban Centre when current planning is completed.

Calculations of residential land requirements factor in provision for roads and open space, with some commercial and institutional uses. Land for commercial and institutional uses is also available at Primary Employment Centres designated in the Regional Plan, at Secondary Employment Centres to be designated in local plans, on vacant parcels zoned for such uses, and through redevelopment and intensification.

Overall, the supply of urban land for all uses is adequate for the current planning period to 2011 and, with full development of the South Urban Centre and Orleans, is sufficient until at least 2024 - over 30 years. This statement assumes that the 1990 population projections remain valid, that employment continues to grow, and that housing densities do not change significantly.

The supply of land for non-residential uses appears to be greater than the supply of residential land. This raises the possibility the at some future point it may be practical to redesignate some parcels of non-residential land for housing. However, any such changes should be carefully assessed against their impact on job and housing distribution in the context of the Regional Development Strategy.

Post-Script: Why do we need a "surplus"?

The Regional Development Strategy in the Official Plan requires that an amount of surplus land be identified "to ensure orderly market operation". A surplus is intended to curb inflation in land values and recognizes that considerable lead time is required for approvals, environmental assessments, and servicing to bring new land on-stream for development.

When the "surplus" land policy was drafted in 1987, projections indicated the supply of land for some purposes could have been adequate for as little as 15 years

by the time of the Official Plan review in 1994. With a relatively tight supply, the surplus made good sense.

In practice, the policy has been confusing because it does not specify how much surplus should be available. The Official Plan initially identified a 10-year supply in 1988, but subsequent amendments (Amendment 1 and Amendment 22) indicated a 15-year and a 5-year supply, respectively. At times, the available surplus has been mistakenly assumed to be a required surplus.

The issue of whether the Official Plan should continue to require surplus land - and how many years' supply should be required - could be resolved by extending the planning horizon to, say, 30 or 40 years (i.e. 2021 or 2031).

The increasing complexity of regional planning, given provincial policies, environmental assessments, and other requirements, suggests that a longer horizon than 20 years is warranted. If we choose a 30 or 40-year Plan, there is no need for a surplus policy. The surplus would be incorporated in the Plan's urban land designations and policies.

The main question is what policies would be required to structure a plan of up to 40 years. For example, should land required beyond a 20-year timeframe have the same designation as shorter term land or should it be given a separate "future development" status to make clear Council's priorities for development? These issues will be the subject of future reports to Planning Committee in the context of the 1994 Official Plan review decision.

• • •

The question of how far to extend the Official Plan is a major issue for the 1994 review. For now, it seems clear that the supply of urban land is more than adequate to meet long term demand. Until Council decides on a development strategy for the years beyond 2011, a moratorium on further additions of urban land should be considered.

Part 3:
Development Trends

This section discusses the achievement of objectives for the physical development of Ottawa-Carleton set out in the Regional Development Strategy (Part 2 of the Official Plan).

3.1 RURAL-URBAN DISTINCTION

The Plan calls for maintenance of a clear distinction between urban and rural areas so that urban services, such as utilities and transportation, can be delivered as efficiently as possible and resources in rural areas, such as farmland, can be protected.

In terms of its overall share of population, housing and jobs the rural area is growing slightly faster than the urban sector. However, rural Ottawa-Carleton is changing in more subtle ways as more and more urban residents move to the country and commute to jobs in the urban area.

The potential for further quasi-urban development of the rural area is increasing steadily due to escalating rural and village lot creation. This activity is monitored annually by the Planning Department in the Rural Lot Creation Report. As of 1987, the last year for which data is available, 50% of rural lots created during the 1975-87 period had not been built upon. Hence, even if lot creation slows down, the potential for continued high development will persist.

Figure 4
Rural lot creation is accelerating

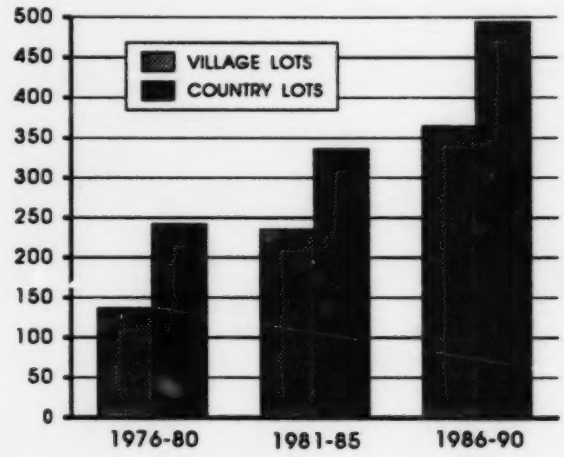
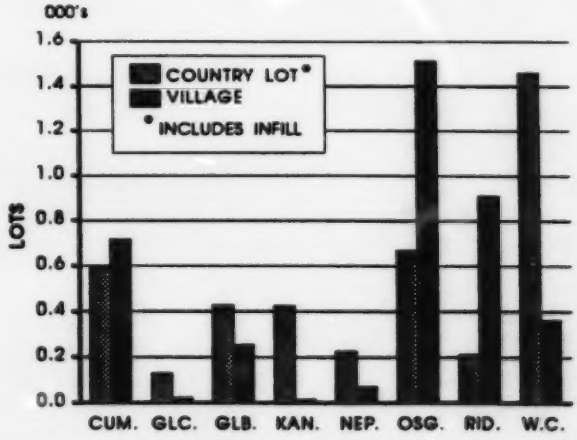


Figure 5
Non-Farm Rural Lot Creation in RMOC 1975-90



Trends in the rural area raise several issues:

- Rural development is generally on private services (wells and septic systems). When these fail, who will be responsible for corrective measures? What is the cumulative impact of many failures in environmental systems?

- Rural development is at low densities and cannot be economically served by public transit.

- A growing non-farm rural population increases the likelihood of conflict with the rural resource-based economy (eg. farming and mineral extraction).

- Villages now comprise 5,740 total hectares of rural land, over one and a half times the size of the whole Kanata urban designation, as an example. With the likelihood that the Ministry of Environment will soon require larger lot sizes in order to reduce groundwater contamination, future village expansions may consume very large amounts of land. The issue may arise whether this form of development can continue to be a viable. Further information on this issue will be brought forward shortly when the Rural Servicing Study is completed.

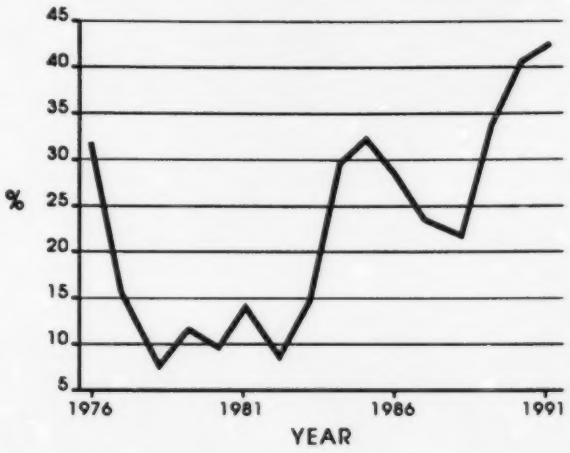
3.2 GROWTH OUTSIDE THE REGION

a) Outaouais share climbing

The Outaouais accounted for 43% of all housing starts in the Ottawa-Hull metropolitan area during 1991. This was the largest proportion of starts that the Quebec side of the metro area has had since at least 1976 and possibly ever (Figure 6). One reason for the increase was a weak market on the Ontario side combined with a housing incentive program in Quebec ending in 1991.

This is a significant reversal of the pattern during the 1977-83 period, when the Outaouais share of starts dipped as low as 8% in some years (eg. 1978), and

Figure 6
Outaouais Share of Ottawa-Hull Housing Starts



averaged only 14% overall. Net migration between the two sides of the river has followed a similar pattern. During the late 1970s and early 1980s there was a net out-flow of people from the Outaouais to Ottawa-Carleton. This slowed in 1983 and since 1984 the flow has been reversed, with net migration to the Outaouais from Ottawa-Carleton reaching about 2,000 persons by 1989-90, the last year for which figures are available.

The most important aspect of population change in the Outaouais as it affects Ottawa-Carleton is its implications for interprovincial bridge traffic. Sizeable numbers of people commute every day between the two sides of the Ottawa River. In 1986, for example, 34,000 Outaouais residents held jobs in Ottawa-Carleton - 10% of all jobs in the region. Almost 17,000 Ottawa-Carleton residents held jobs in the Outaouais, representing about 25% of total jobs in that area.

The 1991 Census may show a slight shift in population to the Outaouais. In 1986, its share of the Ottawa-Hull population was 24.4%. If this trend continues (and it is not at all certain that it will given the uncertain outcome

of constitutional talks), it may place additional pressures on the interprovincial bridge system.

b) Ontario townships outside of RMOC show steady growth trend

Between 1986 and 1990, new housing built in the townships bordering Ottawa-Carleton had climbed to an annual average of 1,250 units, equivalent to 20% of all housing starts in the region. The major area of growth has been the County of Prescott and Russell (550 units/year), particularly the Town of Rockland and the Townships of Clarence and Russell. The other area of significant growth was Lanark County (350 units/year), centred on Carleton Place and adjacent townships.

This pattern is largely a result of people choosing to live outside of Ottawa-Carleton and commute to jobs within the region. In Prescott and Russell, for example, 39% of the county labour force commuted to Ottawa-Carleton to work in 1986. In Lanark, 21% of workers travelled to jobs in the region. About 5% of jobs in the region in 1986 were held by Ontario residents living outside of the region.

Surrounding areas have lower taxes and development charges, and cheaper housing. Migration data available back to 1977 (see Figure 7) show this trend has been growing steadily for many years, and it is likely to continue as the region's economic influence expands further into adjacent counties.

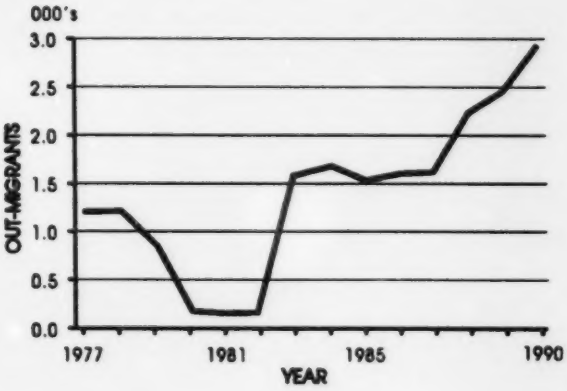
Issues that this trend raises include :

- outside residents use regional services, especially roads, that they do not pay for through the property tax.

- there is a concern that development outside the region is not based on sound planning practice (eg. strip development on regional boundary roads, servicing policies that may threaten aquifers, random small lot development in rural areas).

These issues are the subject of ongoing discussions with both the Ministry of Municipal Affairs and officials of adjacent municipalities. Servicing issues will be addressed by the soon to be completed Rural Servicing Study which includes both the region and all adjacent townships. These matters will be the subject of future reports to Planning Committee.

Figure 7
Out-migration from RMOC to Adjacent Counties, 1977-90



3.3 STRUCTURE OF URBAN AREAS

The internal structure of an urban area is determined by the relationship of land uses to each other and to the transportation system. The main regional concerns are the relationship between where people live and where they work, the density of development and provision of a range of housing types and a variety of jobs.

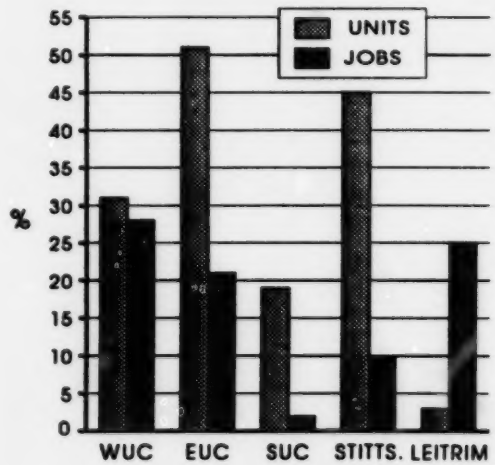
a) Live-Work Relationships

Trips between work and home account for the major share of travel within the urban area and therefore the regional transportation system is primarily designed to accommodate such trips. If workers live closer to their place of work, transportation demands are reduced.

The relationship between work and home can be measured crudely by comparing the number of households living in an area to the number of jobs there, referred to here as the live:work balance.

The Regional Official Plan has policies defining the maximum number of housing units permitted in each of the urban centres outside the greenbelt and the associated number of jobs that should be provided to ensure a proper balance. Figure 8 compares the 1991 level of development in each centre to the Official Plan maximum, and provides a measure of the live:work balance.

Figure 8
1991 Housing and Jobs as % of Maximum Permitted in OP



Since 1981, the urban centres outside the greenbelt have become the major areas of residential growth, while jobs have remained concentrated inside the greenbelt. Despite some improvement since 1986, both the East Urban Centre (Orleans) and the South Urban Centre (Barrhaven) still need large numbers of new jobs to bring the live:work balance into line.

Barrhaven is particularly low because the initial phase of development of some 6,500 units was allowed to proceed with virtually no land provided for employment (the recent approval of South Merivale Business Park will help to redress this situation). It is important to avoid repeating approval of a phasing plan which allows residential development priority over commercial and industrial uses. Since 1986, traffic congestion has significantly worsened on roads connecting the area through the greenbelt (see Figure 11, p. 33).

The pattern of new housing outside the greenbelt connected by an often crowded transportation network to jobs inside the greenbelt is a problem likely to persist through the 1990s. A considerable supply of industrial and commerical land remains inside the greenbelt,while most vacant residential land (86%) is now in the urban centres outside the greenbelt.

A further problem in the location of much of the vacant industrial and commercial land inside the greenbelt is that much of it is difficult to serve well with transit. It can be foreseen that the same issue will become important in the urban centres outside the greenbelt in the future. It is crucial that planning being done now for employment areas in the urban centres give full consideration to transit. How to encourage jobs to develop where they can be provided with good transit service in all parts of the urban area is another major issue in land use planning for transportation.

The imbalance of housing and jobs will increase pressure on the transportation system, particularly in the

east and south parts of the region unless significant job growth occurs in Orleans and the SUC during the 1990s.

Two factors particular to Ottawa-Carleton work against employment growth in suburban areas. First, federal government jobs, accounting for one-fifth of total jobs, are almost exclusively located inside the greenbelt and the federal government has shown little interest in moving outside the greenbelt. In fact, federal government jobs are now more concentrated in the central area than in 1981. Second, the region has little manufacturing and thus no opportunity to encourage these jobs to move to the suburbs. In more industrialized cities, manufacturers have been relocating to modern suburban locations.

Significant job growth outside the greenbelt will require time to achieve.

Until jobs outside the greenbelt are in better balance with housing, issues confronting the region include:

- Should road, sewer, and water services be upgraded for vacant employment land in the urban centres outside the greenbelt in the hope of fostering development?
- Should the continued residential growth of urban centres be discouraged in some cases until job creation catches up?
- Should development at Primary Employment Centres located on the transitway be encouraged in preference to jobs at Secondary Employment Centres (nodes of 2-5,000 jobs designated by local plans) not on the transitway?

More jobs in the central area?

The maximum level of employment in the central area is a particular issue in job distribution. Studies undertaken in 1990 as part of Ottawa's review of central area boundaries and height limits indicated that even with all proposed transportation improvements in place (including bus tunnels), a maximum of about 110,000 jobs could be supported at reasonable levels of traffic congestion. Existing zoning within the present boundaries would allow sufficient development to accommodate the maximum job figure with no extensions of either boundaries or heights. However, the new City of Ottawa Official Plan designates an area immediately to the south of the central area to be studied for mixed commercial-residential development. The transportation implications of any proposals arising from this study should be carefully reviewed by the Region.

b) Distribution of New Jobs

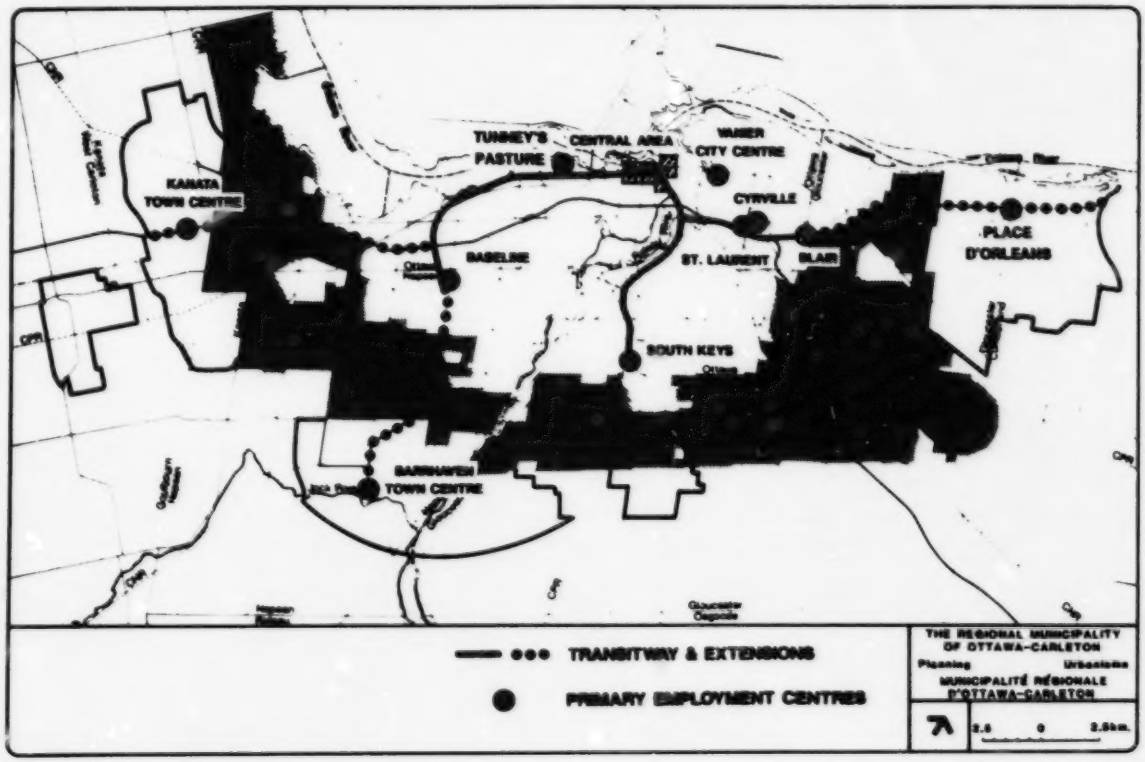
Recognizing that much of the present job distribution is likely to change only slowly with time, the main opportunities to influence employment concentrations are in the location of new employers and moves of existing firms to new premises.

Between 1986 and 1991, about 36,000 new jobs and 3,500 new firm locations were created in Ottawa-Carleton. Policies of the Official Plan encourage new employment to locate at points that can be provided with excellent transit service, especially at certain transitway stations, and in the urban centres outside the greenbelt.

Plan encourages jobs on the transitway

Key transitway stations, such as Blair, Tunney's Pasture, Cyrville, St. Laurent, Baseline, Place d'Orleans and the Kanata Town Centre, are designated Primary Employment Centres in the Official Plan (Figure 9). These nodes provide for at least 5,000 jobs in high density mixed-use developments (10,000 jobs outside the greenbelt). Development at transitway stations is highly accessible to transit riders, encouraging ridership and a high level of service, while reducing the demand for car travel and hence reducing CO_2 emissions and other harmful environmental effects.

Figure 9
Primary Employment Centres and the Transitway



Considerable success has been achieved in attracting development to transitway stations - for example, Blair now has 3,800 jobs from virtually nil in 1981. Others, for example the new Cyrville Primary Employment Centre, have seen little development so far, but provide opportunities for the future. To date, job growth has been concentrated at five Primary Employment Centres on the transitway (Table 8).

Since 1988, development at the five largest transitway concentrations is estimated at between 15% and 20% of all commercial/office construction in the region. This represents a significant proportion of total commercial floorspace built in the region during that time, and shows Primary Employment Centres on the transitway have made a good start at attracting the development which is essential to their success. The success is a qualified one in two respects:

Table 8
Development at Primary Employment Centres on the Transitway

1988-1991	Non-residential Floor Area (m^2)	Housing Units
Tunney's Pasture	19,200	946
Baseline	4,500	0
St. Laurent	41,000	0
Blair (est.)	121,400	0
Place d'Orleans	36,200	128
Total	242,300	1,074

1. Ninety percent of the commercial floorspace listed in Table 8 was built at transitway stations adjacent to a provincial highway (417 or 17). Employment centres not located on a highway, such as Baseline, saw relatively little commercial activity.

2. More coordination is required between Regional, local and private interests regarding the quality of pedestrian connections to transitway stations. Well-designed links that reduce walking distances are essential to attracting a high transit ridership. Details of site design which affect the quality of these connections are controlled through site plan approval, a local municipal responsibility. Area municipalities should be encouraged to comprehensively plan development of each centre to maximize transit access for pedestrians. A set of draft guidelines for municipalities has been prepared to elaborate on regional policies for major employment centres.

A major issue facing the Region is how to shift jobs to the suburbs while maintaining high transit ridership. The only way to achieve this is by increasing the proportion of jobs located on the transitway. Development on the transitway must increase if this objective is to be achieved. The Official Plan may require stronger policies to encourage development on the transitway.

Plan also promotes jobs in the urban centres

Adding jobs in the urban centres outside the greenbelt provides the opportunity for people to live close to their work and for others to commute against the main flow of traffic. The Official Plan provides opportunities for employment in the urban centres related to the number of people who live there. Until recently, the growth of jobs outside the greenbelt has been slow. However, since 1986 significant additions have occurred, representing one of every four new jobs created in the region.

Table 9
Jobs growing outside the greenbelt

	1976	1981	1986	1991
Jobs in the urban centres	4,400	9,600	13,600	24,000
Share of region	1.6%	3.3%	4.0%	6.3%

Current Official Plan policy requires local Plans to designate enough employment land in the urban centres to allow a balance of housing and jobs. However, to date, population growth has far exceeded job creation. Despite recent improvements, the question of how to further increase employment outside the greenbelt is another major challenge to planning in Ottawa-Carleton.

c) Quality of Urban Areas

A general objective of the Plan is the development of urban areas "each of which provides a mix of housing types, a variety of jobs, and a full range of urban services and facilities".

Achievement of these objectives is mainly relevant to the three urban centres outside the greenbelt.

Urban Centres limited in choice of housing, jobs

- All centres lack choice in apartments, especially the EUC (Orleans) and SUC (Barrhaven).
- Orleans and the South Urban Centre (Barrhaven) are substantially deficient in job creation.
- Orleans and the SUC have employment concentrated in population-serving jobs.
- Only Kanata has a diversified employment base.
- Only Orleans has a significant retail component.

Table 10
Variety of housing types and jobs in the urban centres

	Housing Type (%)			Jobs (%)			
	SF	MS	AP	Manuf.	Retail Trade	Services	Other
WUC	59	34	7	33	14	45	8
EUC	69	27	4	1	37	47	15
SUC	61	37	2	2	28	59	11
Total Urban RMOC	43	24	34	6	11	44	40

Notes:
1. SF=single family; MS=multiples; AP=apartments
2. Housing uses 1991 estimates pending Census
3. Preliminary job data from 1991 survey

Time is required for housing and jobs to diversify in the urban centres. Apartment construction will accelerate as the population ages over the next two decades and beyond. Job diversification is more of a challenge.

Kanata was fortunate in attracting a cluster of high-technology firms early on which has grown and matured and now has its own momentum for further growth. However, the Kanata Town Centre has been slow to develop, and the area is lacking in major shopping facilities.

Orleans now has a well-established Town Centre including a regional shopping centre and is the most complete of the three centres in shops and services for its relatively large population of 70,000. But the area has yet to establish an employment base outside of population-serving jobs, and it remains to be seen whether major employers will chose to locate there.

The South Urban Centre in Nepean got off to an unbalanced start and is at present essentially a large residential neighbourhood outside the greenbelt. The planned South Merivale Business Park should help to redress the balance, but development of the Town Centre is likely some years away.

d) Development Policies in the Urban Centres

An important part of the Plan's Regional Development Strategy sets out policies for development of housing and jobs in the urban centres outside the greenbelt. For each of the three major centres a range of housing units and jobs is established. Local official plans are required to provide policies for development within the ranges set by the regional plan.

Although the Official Plan specifies a range of dwelling units, in practice most local municipalities have opted to plan for the maximum permitted number. This approach makes best use of available urban land, and should encourage future intensification and higher densities.

However, planning for the maximum should not be regarded as a valid argument for adding more urban land to achieve the top end of the range based on current low densities. In the long term, the higher densities that the Official Plan encourages will be needed, as discussed in Part 2 of this report.

3.4 PROVISION OF INFRASTRUCTURE

Most major infrastructure in Ottawa-Carleton is the responsibility of the Region to provide. This includes major sewers, all piped water supply, water and wastewater treatment facilities, transitways and related stations, and arterial roads and bridges. The Region also pays a part of communal water and sewage systems which may be needed in the rural area.

Table 11
Official Plan Policies for Growth of Urban Centres

Urban Centre	Range in Regional Official Plan		Development as of 1991		Potential Units On Vacant Land
	Dwelling Units	Jobs	Units	Jobs	
Kanata WUC	25-35,000	30-43,000	11,000	12,200	24,000
Orleans EUC	30-40,000	36-52,000	20,500	10,800	19,500
South Urban Centre (SUC)	25-33,000	30-43,000	6,500	1,000	26,500
Stittsville *	6,000	7,000	2,800	700	3,200
Leitrim *	3,200	4,000	100	1,000	3,100

* Stage 1 development only
Note: Potential units on vacant land based on Official Plan maximum.

This infrastructure is costly to construct and maintain, and hence it is prudent to ensure that the maximum benefit is obtained in planning for development that requires regional services. The Region also has a responsibility to ensure that quality services are provided to residents.

a) Supply of Serviced Land is Adequate

At present there is an adequate supply of urban land with water and sewer services for both residential and industrial needs, based on surveys undertaken annually by the Planning Department.

As of Dec 90, there was a 9.9-year supply of serviced residential land. This supply essentially meets the objective of a 10-year supply in the Regional Official Plan as well as the provincial Land Use Planning for Housing policy statement.

The supply of serviced residential land is also in reasonable balance between areas inside the greenbelt, and the main urban centres to the east, south and west. Based on projected development, all areas have at least 7 years of serviced supply.

The supply of serviced industrial land, at 17.5 years, is ample for present needs.

b) Water Problems in Some Villages

The Plan prohibits the provision of centralized sewer or water services to rural areas except where they are required to address a health problem. This restriction is intended to avoid the high cost of providing such services and to discourage over-development of the rural area.

Studies are underway or have been completed to remedy problems of polluted drinking water in the following villages:

- **Vars** - communal well to be built (Amendment 7 to the Regional Plan).
- **Carp** - communal well and sewer extension from Kanata to be built (Amendment 21).
- **Carlsbad Springs** - staff recommend home-based water treatment systems.
- **Metcalfe** - communal well recommended.
- **Marionville** - communal well recommended.

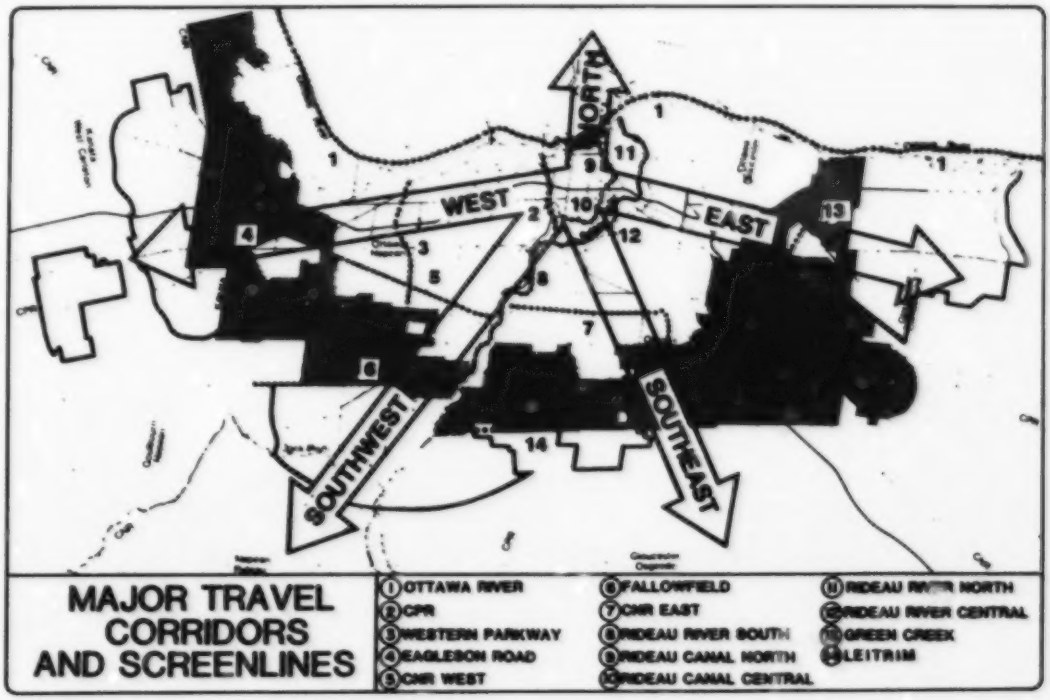
Water problems in other villages are likely to arise as development continues and septic systems deteriorate (eg. Manotick). These and other issues will be addressed by the soon to be completed Rural Servicing Study. Recommendations arising from this report will be brought before Planning Committee for action to reduce the incidence of such problems.

c) Congestion Levels at Major Screenlines

The Official Plan has adopted a level of service standard for the road system during weekday peak periods of travel which will result in high use of the system, while avoiding significant delays and low operating speeds. This condition generaly describes a level of service " D " as defined by transportation engineers. Severe congestion, continuous traffic back-ups at intersections and stop and go conditions under level of service " E " result in increased levels of pollution per vehicle, frustration and waste.

The Transportation Department as part of its system monitoring programme, undertakes traffic counts along major travel corridors (Screenlines). These major travel corridors and screenlines are depicted in Figure 10.

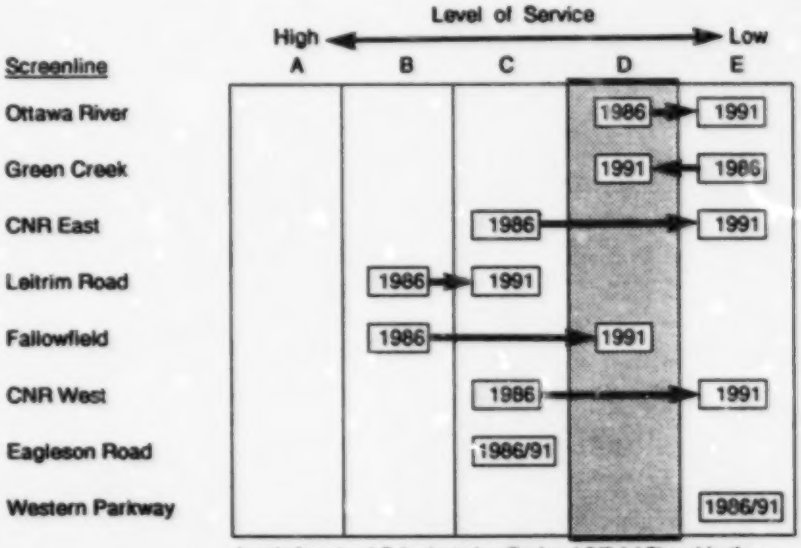
Figure 10
Major Travel Corridors and Screenlines



A comparison of the various levels of service based upon data collected in 1986 and 1991 indicate the number of corridors experiencing severe congestion (LoS " E ") have increased from two to four (Figure 11).

The level of service has improved at Green Creek (east side of the Greenbelt) with the opening of the Blackburn Hamlet By-pass. Traffic growth in the south associated with new housing development in southeast Ottawa and Barrhaven has had a noticeable impact on levels of service. Both the CNR East and the CNR West Screenlines have experienced level of service reductions from " C " to " E ".

Figure 11
Level of Road Service at Major Screenlines



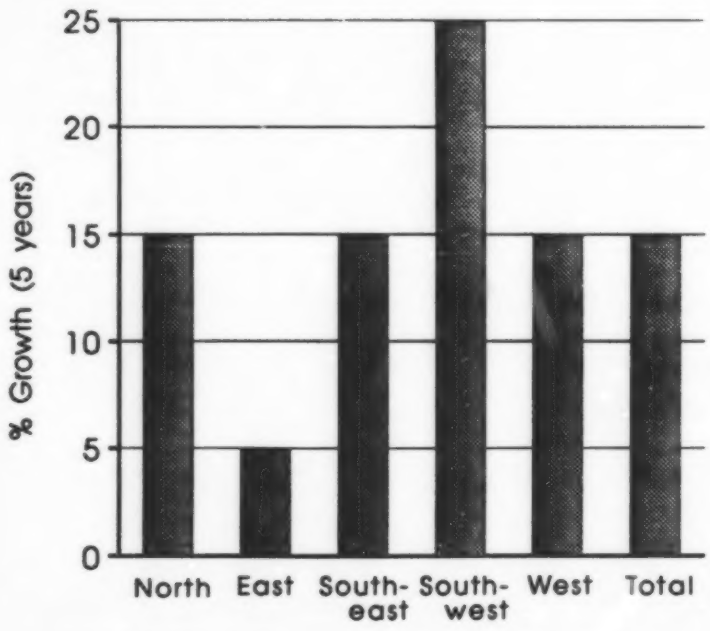
Level of service " D " adopted as Regional Official Plan objective.
Level of service reported for PM peak hour.

Increases in vehicular traffic since 1986 generally correspond to these changes in level of service (Figure 12). Afternoon peak hour volumes rose about 15% overall. By corridor, the largest increase occurred in the southwest related to the expansion of Barrhaven where development has grown by about 50% since 1986.

In developing Regional transportation programmes to alleviate congestion, both the supply and demand sides of transportation need to be analysed and managed. Official Plan policies address this issue through the coordination of land use planning and transportation planning.

In general, the Official Plan strategy includes the development of the regional transportation system, adding both transit capacity and road capacity to serve the Regional Development Strategy. The Official Plan strategy also includes a balanced distribution of jobs and housing, improving transit by extending the transitway, encouraging transit friendly development (residential and commercial), and creating employment centres outside the central area primarily along the transitway system. Recent increases in road congestion serve to emphasize the importance of realizing these objectives of the Official Plan.

Figure 12
Growth in Vehicle Trips by Corridor
1986 - 91



Note: Vehicle counts for p.m. peak hour

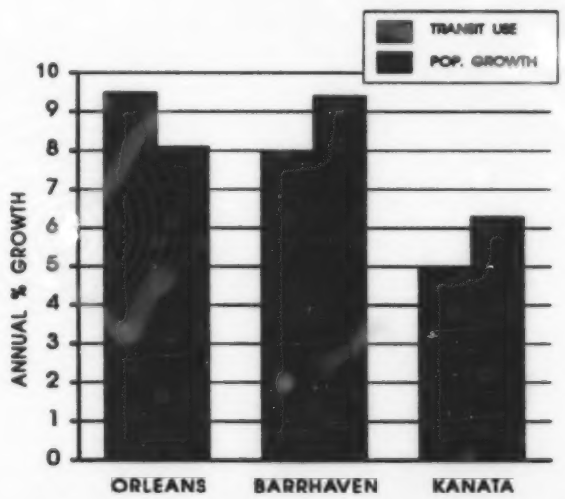
d) Transit

The Official Plan emphasizes the continued development of the transit system as well as improvements in the regional road system to accommodate increases in travel demand. A key part of the Plan's transit strategy is the extension of the transitway. To date, 25 km of the original 31 km system has been completed. The final 6 km section from the Riverside Hospital to Hunt Club Road (South Keys) is scheduled to open in 1994.

Where the effects of transitway quality of service for the total trip can be isolated, as in the east corridor at Green Creek, it is clear that transit usage has outpaced population growth. In other locations where the transitway service covers only a portion of the trip, such as Kanata and Barrhaven, transit use has not grown as quickly as the growth in population. Thus it appears that to increase the percentage of trips made by transit it is important that the transitway be extended to the population growth centres outside the greenbelt as soon as possible.

Official Plan policies for future extensions of the transitway give first priority to completion of the system approximately to the inner limit of the greenbelt to the west, southwest, east and southeast, and to transitway stations in the town centres outside the greenbelt. Second priority is given to extensions to the Orleans and Kanata town centres, and, as a third priority, to the South Urban Centre. Given indications of need in the southwest corridor, the policy giving lower priority to the South Urban Centre may warrant review in 1994.

Figure 13
Growth in Transit Service vs. Population by Urban Centre
1986 - 91



Note: a.m. peak hour; compound annual growth; transit data from OC Transpo

Part 4 : Emerging Issues

This report raises a wide range of issues for the 1990s. Those with particular implications for the Official Plan are noted below. In many cases issues overlap, suggesting that solutions do too.

1. Increased Understanding of the Complexity of Planning - planning increasingly involves multi-disciplinary, multi-agency partnerships. This trend will very probably continue, for example, with the move to integrate federal and provincial environmental assessment requirements with the planning process. There is also an increased understanding and appreciation of the interrelationships between economic, environmental and social decisions.

2. Transportation Pressures - transportation demand may be growing faster than our ability to pay for improvements to road and transit systems. The Region will have to look for innovative ways to deal with congestion problems and increase the proportion of jobs located at transitway stations. In this regard, increased attention will have to be given to the interrelationship between transportation decisions and land use decisions in the region.

3. Integrated Resource Management - Wetlands, prime agricultural land, major woodlots, river shorelines, other significant natural features and their interrelationships, are expected to receive greater attention both from local residents and provincial policies. The development approval process should require more consideration of environmental impact, including impact not only on natural processes but also on economic and social aspects. Generally, concern for the environment is the single most pervasive public issue to arise during the last 10 years. The Environmental Review that begins in 1992 will raise key issues for the 1994 Official Plan review.

4. Economic Development - in an increasingly competitive world economy, governments at all levels will be required to take economic development factors into acount in their policies. The issue of what actions the Region can take to foster economic growth will be another challenge for the 1990s.

5. Rural Servicing and Development - the trend to increasing development activity in the rural area raises issues of the adequacy of private sewage and water systems, conflicts with established rural uses, and the changing character of the rural area. There is a need to evaluate the overall impact of increasing rural development.

6. Provincial initiatives, especially the Sewell Commission, will likely result in significant changes at the municipal level. This may involve more stringent review of urban land additions, higher densities, more housing intensification, and more public consultation.

7. Urban Land - there is enough urban land designated in the Official Plan to provide for demand to at least 2014. Depending on Council's policy for the South Urban Centre and Orleans, the land supply may also be sufficient to about 2024. This raises several issues. Do we need further additions to urban land? Should the planning horizon of the Plan be extended beyond 2011 and by how much?

8. Growth outside the Region - communities adjacent to the borders of Ottawa-Carleton, in both Ontario and Quebec are experiencing increased residential development fueled by continued economic development in Ottawa-Carleton. This trend raises issues of rural servicing, increased transportation demand, and the possibility that Regional Council should have a mechanism for influencing decisions taken beyond its boundaries.

APPENDIX A

Official Plan Amendments

The purpose of this Appendix is to describe in more detail the effect of individual amendments summarized in Section 1.1 of the main report.

1. AMENDMENTS TO SCHEDULE A - RURAL POLICY PLAN (SEE TABLE A-1)

a) Adopted by Council:

#1 - Orleans Expansion - described in the main report, p. 4.

#5 - Cedar Ridge - permitted a 21 lot estate subdivision 6 km southeast of Carp in West Carleton Township, through a redesignation from Mineral Resource Area to General Rural Area. The land was the site of an exhausted sand and gravel pit.

#8 - Palladium - described on p. 4 of main report.

#9 - Don Johnston - permitted country lot development north of the village of Kinburn in West Carleton; 25 ha redesignated from Agricultural to General Rural.

#24 - Scott and Wyatt - redesignation of 36 ha of Agricultural land in Rideau Township to General Rural in order to permit country lot development on the site of a former quarry.

#26 - Central Canada Exhibition Location - redesignated 103 ha of Agricultural land in southern Gloucester to Major Community Facility in order to provide a new site for the CCEA. However, Gloucester Council refused the application to amend the local plan, and the application was subsequently withdrawn. A study of alternative sites is underway by the applicant.

#28 - Sunset Lakes - redesignated 13 ha of land in Osgoode Township on the Gloucester boundary from Mineral Resource Area to General Rural Area to expand the Village of Greely. The land was the site of a depleted (unlicensed) sand and gravel pit.

b) Pending Applications:

These will be brought before the Committee in the coming months.

c) Refused Applications:

Council has refused two applications:

- An application to redesignate 210 ha from Agricultural Resource to General Rural in southeast Gloucester for a country lot subdivision was refused in part due to water quality problems as well as a desire to protect agricultural land.

- An application to redesignate 215 ha of wetlands in the Leitrim area from Urban Area to Marginal Resource (Restricted) was refused since the area was already approved for urban development and MNR had agreed to pursue protection of the wetlands through the subdivision process.

TABLE A-1
OFFICIAL PLAN AMENDMENTS TO SCHEDULE "A" (RURAL POLICY PLAN)
by Policy Area in Hectares

	AMENDMENTS ADOPTED BY COUNCIL								PENDING APPLICATION	AMENDMENTS REFUSED BY COUNCIL		
OFFICIAL PLAN DESIGNATION	#1 ORLEANS EXPAND.	#5 CEDAR RIDGE	#8 PALLADIUM	#9 DON JOHNSTON	#26 CCE LOCATION	#28 SUNSET LAKES	#24 SCOTT & WYATT	SUB-TOTAL	SUB-TOTAL	LEITRIM WETLAN	CITY OF GLST.	SUB-TOTAL
AGRICULTURAL RESOURCE	-785		-40	-22	-103		-36	-986	-416		-240	-240
GENERAL RURAL	-460	5		22		13	36	-384	112		240	240
MARGINAL RES. (RESTRICTED)								0	0	215		215
MINERAL RESOURCE		-5				-13		-18	162			0
NATURAL ENVIRONMENT								0	0			0
WATERFRONT OPEN SPACE								0	0			0
VILLAGE								0	0			0
URBAN AREA	1245							1245	142	-215		-215
MAJOR COMMUNITY FACILITY			40		103			143	0			0

Information as of 27/1/92

APPENDIX B

Urban Residential Land Requirements, 1986-2011

The approach to estimating urban land requirements uses the "land Budget" approach. Demand for urban residential land is calculated on one side of the ledger and weighed against supply to yield a surplus or deficit of land.

Demand for Urban Land

Overall regional demand uses the 1990 updates of population and households published by the Planning Department in Apr 90. It should be noted that achievement of the projected levels of population and households assumed in this analysis is dependent on sufficient numbers of jobs being created to support this level of development (see Table 4, p. 15 for 2011 projections).

Total regional housing requirements, after allowing for demolitions at 240 units/year and a 3% vacancy rate in the rental stock, are about 376,000 units. This is an increase of about 115,200 units over the 1991-2011 period (see tables below).

Two adjustments are made to convert total unit demand to a vacant urban land equivalent. First, new housing in the rural area is subtracted. This has been assumed at 10%, although the actual share has been 12% through the 1980s (up from 7.2% during 1971-81). Total demand on urban land is therefore about 103,700 (see tables). Secondly, "intensification" (units not built on vacant land but added through redevelopment, infill and conversions) is subtracted. Intensification activity has varied considerably since 1984 when monitoring began. Through the mid-1980s it averaged slightly over 20% of all urban units built. More recently, it has fallen as low as 6% in some years, which is attributed to a softening in both the condominium and rental apartment markets particularly in the inner area. Since monitoring began in 1984, the rate has averaged 15.5% (see table below). For purposes of this analysis, a range of intensification rates is assumed; 10%, 17.5% and 25%. Future rates of intensification are likely to be higher than experienced during the 1980s based on new affordable housing legislation and prospects for alternative development standards which may facilitate development on non-standard land parcels.

Intensification Rates 1984-90

1984	13%
1985	21%
1986	26%
1987	6%
1988	13%
1989	7%
1990	23%

Using the above range of intensification rates, demand on vacant urban residential land is projected to be between about 77,765 units and 93,320 units during 1991-2011, with a "medium" projection of 85,540 units.

Supply of Urban Land

The supply of vacant urban residential land is comprised of four components:

1. Parcels in the vacant urban residential land inventory (monitored annually by the Planning Department). Over half the inventory consisted of "mixed" units in 1990 (parcels with no specific unit type identified or where more than one type of unit is proposed). Mixed units were

broken out by unit type on the basis of 50% singles, 30% multiples and 20% apartments, this split coinciding with overall average densities for mixed lands. Overall vacant land potential for Dec 90 was updated to the projection date (1 Jun 91) using urban housing starts. Total 1991 potential is 64,186 units (see table).

2. Land with planning studies underway in the Orleans Expansion Area and the South Urban Centre. In Orleans, the ROPA 1 area could accommodate about 11,100 units before the 40,000 unit limit in the Regional Official Plan was achieved. In the SUC the Regional Plan provides for up to 33,000 units to be built. Subtracting units already built and vacant land included in the inventory (1 above) in the Longfields area, there is potential for about 18,500 additional units in the SUC. These units are split by type based on past trends (65% singles, 25% multiples, 10% apartments).

3. Small additions of "Stage 2" land in Leitrim and Stittsville resulting from the 1991 OMB decision on the Official Plan. Based on the OMB ruling, approximately 32 net ha would be available for residential use in Leitrim, depending on the results of future studies. In Stittsville, approximately 79 net ha would be added to the land supply. Total unit potential for both areas is calculated at 2,553 units based on current densities. The unit split is the same as noted in point 2 above.

4. Major areas inside the greenbelt which are likely to be developed with some residential use. These are all federal (or former federal) land holdings, and consist of LeBreton/Bayview, Clyde/Merivale, and CFB Rockcliffe. Based on development plans to date, a total potential of about 5,850 units exists in these areas. The unit split is 14% singles, 43% multiples and 43% apartments based on known development plans.

Overall potential on vacant residential land is estimated at about 102,200 units. This is between 8,900 and 24,400 units above projected demand to 2011, and represents between 1.6 and 4.3 years of "surplus" demand beyond 2011 (see tables).

The foregoing assessment of the adequacy of the land supply is conservative in several respects:

- Demand for land is based on housing densities by unit type for the 1986 to 1990 period. No allowance is made for the higher densities that may arise from implementation of alternative development standards or new Regional and provincial policies that target 25% of new units as affordable units, likely to be multiples of some type. A 10% increase in densities would, for example, reduce land requirements by 269 net ha during 1991-2011.

- As noted, the rural share of the region's housing in the last decade has been higher than assumed in the projection (12% rather than 10%). Use of the higher figure would reduce the need for urban land by 115 ha - the amount required for 2,300 single-detached houses.

Industrial Land Supply

Industrial land supply stood at 2,200 net hectares at the end of 1990 based on results of the 1990 Vacant Industrial Land Survey. This excludes industrial lands proposed in the Orleans Expansion Area (142 net ha) and the South Urban Centre (estimated at about 400 ha). Based on projected employment, demand for industrial land over the 1990-2011 period is estimated at approximately 1,000 hectares.

TOTAL HOUSING DEMAND, 1986–2011

Total Unit Requirements, including vacancy and replacement of demolitions:

	SF	MS	AP	TOTAL
1986	94710	54340	79105	228140
1991	110574	62244	87898	260716
1996	127103	68417	95555	291075
2001	142031	74630	102267	318927
2006	155979	79603	111517	347099
2011	169057	84401	122465	375923

Additional Unit Required	SF	MS	AP	TOTAL
additions 1986 - 1991	15864	7904	8793	32576
additions 1991 - 1996	16529	6173	7658	30360
additions 1996 - 2001	14928	6213	6712	27852
additions 2001 - 2006	13948	4973	9250	28172
additions 2006 - 2011	13078	4798	10948	28824

Additions by type - %	SF	MS	AP	TOTAL
1986 - 1991	48.7	24.3	27.0	100.0
1991 - 1996	54.4	20.3	25.2	100.0
1996 - 2001	53.6	22.3	24.1	100.0
2001 - 2006	49.5	17.7	32.8	100.0
2006 - 2011	45.4	16.6	38.0	100.0

DEMAND ON URBAN LAND, 1991-2011:

	SF	MS	AP	TOTAL
Total Unit Requirements	58483	22157	34567	115207
- 10% rural (all SF)	-11521	0	0	-11521
TOTAL unit requirements on urban land	46962	22157	34567	103687

Unit potential from Intensification using range of 3 assumptions

"Low" (10%)	933	1182	8253	10369
"Medium" (17.5%)	998	2450	14698	18145
"High" (25%)	1037	3629	21256	25922
Assumed mix of infill units:				
Low	9%	11%	80%	100%
Medium	5.5%	13.5%	81%	100%
High	4%	14%	82%	100%

DEMAND ON VACANT URBAN LAND, 1991-2011

Intensification Assumption	SF	MS	AP	TOTAL
Low	46029	20975	26314	93318
Medium	45964	19708	19870	85541
High	45925	18528	13311	77765

SUPPLY ON URBAN LAND, 1991-2011:

	SF	MS	AP	TOTAL
Vacant Land Survey (Dec 90)	10219	5674	13589	29482
+ "mixed" units *	17765	10659	7106	35529
Total Vacant Res Land	27984	16333	20695	65011
adjusted to 1/6/91	-304	-197	-324	-825
Total on inventoried land	27680	16136	20371	64186
Additional land outside inventory: **				
ROPA 1 (Orleans Expansion)	7200	2800	1100	11100
SUC (unbuilt areas)	12025	4625	1850	18500
Leitrim Stage 2	478	184	74	736
Stittsville Stage 2	1181	454	182	1817
Major areas inside greenbelt	810	2506	2534	5850
TOTAL unit potential on vacant urban land	49374	26705	26110	102189

SUPPLY VS. DEMAND	SF	MS	AP	TOTAL
Total Supply	49374	26705	26110	102189
Total Demand:				
Low Intensification	46029	20975	26314	93318
Medium "	45964	19708	19870	85541
High "	45925	18528	13311	77765

Surplus Units:	SF	MS	AP	TOTAL
Low Intensification	3345	5730	-204	8871
Medium "	3410	6997	6241	16648
High "	3449	8177	12799	24424

Surplus Land (net ha):	SF	MS	AP	TOTAL
Low Intensification	167	155	-2	321
Medium "	170	189	47	407
High "	172	221	97	490

Demand years of surplus beyond 2011:	SF	MS	AP	TOTAL
Low Intensification	2.0	4.7	-0.1	1.6
Medium "	2.0	6.2	2.3	3.0
High "	2.1	7.9	4.7	4.3

Assumptions	SF	MS	AP	TOTAL
* split in mixed units	50%	30%	20%	100%
** unit mix in new areas	65%	25%	10%	100%
** density (units/net ha)	20	37	132	

*** Demand beyond 2011: see tables in Appendix C.

Note: SF = single family; MS = multiples (semis & townhouses); AP = apartments

APPENDIX C

Urban Residential Land Requirements, 2011-2031

Analysis of supply and demand after 2011 uses the same approach to that outlined in Appendix B, but revises certain assumptions. These changes are discussed below.

1. Projected Population

The current 2001 population projection of 871,000 was taken as a starting point. For simplicity, the assumptions of the current projection (varying only the volume of net in-migrants) were carried forward for the post-2011 period.

Three levels of net annual in-migration were tested:

3,000 - about 45% below the average of the last 25 years (1961-1986).

5,600 - average of the last 25 years

7,000 - 25% above 25 year average (level used in current Official Plan projection for 1986-2011)

Due to the slowdown in growth as the population rapidly ages after 2011, there is relatively little spread (10% by 2031) between the projections: see Table 7, p.17.

For brevity, only the "high" scenario is developed in the tables and presented in Part 2 of the report.

With the recent increase in federal immigration levels, in 1991 Statistics Canada issued revised projections for Canada to 2036. Unlike previous forecasts, these project continuing population growth past the 2036 horizon year. However, even with the policy change, Canada's population will continue to grow ever more slowly, reducing the pool of potential migrants to Ottawa-Carleton. In future, migration will be increasingly from new arrivals to Canada.

In recent years Ottawa-Carleton has received about 3% of immigrants to Canada. With a 250,000 annual immigration quota, the region could expect to receive about 7,500 total foreign in-migrants yearly. However, substantial numbers also leave each year, so that on a net basis only a fraction stay. Based on taxation data, this proportion has varied from 47% during 1986/87-89/90 down to 14% for 1983-86. During 1976-82, it averaged 39%, close to the 1976-89 average of 38%. Based on the above, a 250,000 quota could result in between 1,050 and about 3,500 net foreign migrants to Ottawa-Carleton. Since net in-migration from the rest of Canada averaged only 1,570 over the last five years (compared to about 3,100 between 1976 and1985), a high rate of job creation or another substantial increase in immigration quotas would be required to realize a level of 5,600 net migrants. This projection therefore precludes any major reductions in federal government jobs in this area which could result from future transfers of federal responsibility to the provinces.

Maintenance of 5,600 in-migrants annually therefore assumes continued strong economic growth in Ottawa-Carleton. Migration will also increasingly be the major source of population growth. Natural increase (the excess of births over deaths) is projected to go from about 4,000 in 1991 to 2,300 in 2011 and will hit 0 by 2024. By 2031, there would be 2,300 more deaths than births in the region.

The low migration figure (3,000 annual) assumes 1,100 net international migrants and 1,900 net migrants from within Canada. The high figure (7,000

annual) represents a continuation of projected levels over the 1986-2011 period. This assumes that Ottawa-Carleton will increase its share of international (and domestic) migrants, which is dependent on increased job opportunities.

Demand for land

Rural demand has been 12% of regional demand during 1981-91, rather than the 10% assumption previously used. Given that an increasing proportion of the region's population will be retired from the labour force after 2011, rural living may be attractive to a larger minority than currently assumed. The rural share of housing is therefore assumed to be 12%. The assumed mix is 95% singles and 5% apartments. Given the anticipated demand for rural housing, it is reasonable to assume that a) technical solutions to present-day servicing problems will be found, and b) prospective rural residents will be willing to pay the associated costs.

Intensification bears particular attention given the projected large increase in the proportion of apartments after 2011. On average over the 1984-90 period, the region experienced an infill rate of 15.5% while market demand for apartments amounted to about 25% of all units.

After 2011, apartment demand will double, to about 50% of all units. While most infill sites for lower density units are expected to be depleted by 2011, aging residents of established areas may be much more receptive to well-designed apartments on the edges of their neighbourhoods or even within them. An increase in intensification of at least 50% from the ranges assumed in the 1991-2011 period is therefore quite conceivable (i.e. a range after 2011 of 15%, 26.25% and 37.5%). The unit mix is assumed to be 10% multiples and 90% apartments.

Assumptions on densities are held constant. This is conservative, as current trends may increase densities.

Total unit demand on vacant urban residential land is projected at between 51,000 and 69,000 units, depending on the rate of intensification.

Supply of Land

Within lands currently designated Urban Area on Schedule A of the Official Plan, several areas of vacant residential land will remain in 2011. Their potential for housing development is discussed in the following sections:

a) Surplus Potential Identified in 1991-2011 Analysis

Appendix B concluded that a surplus potential of between 8,900 and 24,400 units would remain in 2011.

b) Orleans Expansion in Excess of 40,000 Units

Regional Council has formally approved 40,000 units in Orleans subject to certain conditions in the Regional Official Plan. However, draft plans for the Orleans Expansion Area indicate a total unit potential for Orleans of about 44,500 units (note: this estimated potential does not take account of higher densities that would result from more units on the Gloucester side of the area being built as multiples and apartments; draft plans dated Apr 91 suggest only 11% of units would be multiples, with no apartments). Analysis of development potential up to 2011 considered only the 40,000 unit maximum specified in the Official Plan.

It has now been proposed that the additional 4,500 units could be built subject to phasing policies for transportation and piped services. It is assumed for this analysis that at some point in the 2011-31 period the phasing requirements would be met and the additional units could be built. Council must still decide if the extra 4,500 units are acceptable and, if so, amend the Regional Plan accordingly.

The 4,500 units are comprised of 3,800 units identified on the April 1991 development plan prepared by Malone, Given, Parsons consultants, plus development

potential in two Special Policy Areas on the same plan (SPAs 1 and 5). These two areas are estimated to have a development capacity of about 700 units.

c) Full Development of the South Urban Centre

As discussed in Section 2.3 of the main report, Regional Council must decide if development of the whole semi-circle identified on Schedules A and B of the Regional Official Plan will be permitted and, if so, amend the policy in the Plan that currently limits the SUC to a maximum of 33,000 units and 3,400 gross hectares.

The difference between the 3,400 ha limit and the area within the semi-circle is 1,465 gross ha. An estimated 18,200 units could be accommodated in this area.

Overall supply, assuming approval of additional lands in the SUC and Orleans, ranges from 31,000 units to 47,000 units. (The variation in supply stems from the range of surplus remaining at the end of the 1991-2011 period, which varies according to rate of intensification.)

The calculated shortfall in urban residential land in 2031 ranges from 239 net ha to 584 net ha (see tables).

TOTAL HOUSING DEMAND, 2011-2031

Housing requirements including demolition & vacancy:

	SF	MS	AP	Total
2011	169057	84401	122465	375923
2016	177396	90528	136182	404106
2021	187499	94076	148221	429796
2031	202649	98196	167897	468743

Additional Units by Type - %	SF	MS	AP	TOTAL
2011-16	29.6	21.7	48.7	100.0
2016-21	39.3	13.8	46.9	100.0
2021-31	38.9	10.6	50.5	100.0

URBAN HOUSING DEMAND assuming 12% rural	SF	MS	AP	Total Urban	Total Rural
2011-16	5126	6127	13548	24801	3382
2016-21	7174	3549	11884	22607	3083
2021-31	10710	4120	19443	34273	4674
Total 2011-31	23011	13795	44875	81681	11138

POTENTIAL FROM INTENSIFICATION Intensification Assumption	SF	MS	AP	Total Units
"Low" (15%)	0	1225	11027	12252
"Medium" (26.25%)	0	2144	19297	21441
"High" (37.5%)	0	3063	27567	30631
Assumed unit mix:	0%	10%	90%	100%

UNIT DEMAND ON VACANT URBAN RESIDENTIAL LAND

	SF	MS	AP	Total on VL	Intens'n Units
15% Intensification					
2011-16	5126	5755	10200	21081	3720
2016-21	7174	3209	8832	19216	3391
2021-31	10710	3606	14816	29132	5141
Total	23011	12570	33848	69429	12252
26.25% Intensification					
2011-16	5126	5476	7689	18291	6510
2016-21	7174	2955	6543	16673	5934
2021-31	10710	3220	11346	25276	8997
Total	23011	11651	25578	60240	21441
37.5% Intensification					
2011-16	5126	5197	5178	15501	9300
2016-21	7174	2701	4254	14130	8478
2021-31	10710	2835	7876	21420	12852
Total	23011	10732	17308	51051	30631

NET HA OF VACANT URBAN RESIDENTIAL LAND REQUIRED

	SF	MS	AP	TOTAL	Ha/yr
15% Intensification					
2011-16	256	156	77	489	98
2016-21	359	87	67	512	102
2021-31	536	97	112	745	75
Total	1151	340	256	1747	87
26.25% Intensification					
2011-16	256	148	58	463	93
2016-21	359	80	50	488	98
2021-31	536	87	86	709	71
Total	1151	315	194	1659	83
37.5% Intensification					
2011-16	256	140	39	436	87
2016-21	359	73	32	464	93
2021-31	536	77	60	672	67
Total	1151	290	131	1572	79

SUPPLY & DEMAND FOR URBAN LAND, 2011-2031

A. Low Intensification (15%)							
SUPPLY	Unit Potential				Net Resid'l	Gross Urban	Density
Source	SF	MS	AP	Total	Ha	Ha	u/net ha
Surplus at 2011	3345	5730	-204	8871	321	534	27.7
ROPA 1 over 40K units	2470	380	950	3800	141	235	27.0
ROPA 1 other areas*	443	68	170	681	25	32	27.0
SUC over 3400 ha	11846	1823	4556	18225	676	1465	27.0
Total	18104	8000	5473	31577	1163	2266	27.2

ESTIMATED SURPLUS (DEFICIT) IN UNITS & LAND, 2011-31

	UNITS:				HECTARES:			
	SF	MS	AP	TOTAL	SF	MS	AP	TOTAL
DEMAND	23011	12570	33848	69429	1151	340	256	1747
SUPPLY	18104	8000	5473	31577	905	216	41	1163
SURPLUS (DEFICIT)	-4907	-4570	-28375	-37852	-245	-124	-215	-584
YEARS OF SURPLUS (DEFICIT) AT 2031	-7.8 years (2023)							

B. Medium Intensification (26.25%)					Net	Gross	
SUPPLY	Unit Potential				Resid'l	Urban	Density
Source	SF	MS	AP	Total	Ha	Ha	u/net ha
Surplus at 2011	3410	6997	6241	16648	407	534	40.9
ROPA 1 over 40K units	2470	380	950	3800	141	235	27.0
ROPA 1 other areas*	443	68	170	681	25	32	27.0
SUC over 3400 ha	11846	1823	4556	18225	676	1465	27.0
Total	18169	9268	11917	39354	1249	2266	31.5

ESTIMATED SURPLUS (DEFICIT) IN UNITS & LAND, 2011-31

	UNITS:				HECTARES:			
	SF	MS	AP	TOTAL	SF	MS	AP	TOTAL
DEMAND	23011	11651	25578	60240	1151	315	194	1659
SUPPLY	18169	9268	11917	39354	908	250	90	1249
SURPLUS (DEFICIT)	-4842	-2383	-13661	-20886	-242	-64	-103	-410
YEARS OF SURPLUS (DEFICIT) AT 2031	-5.8 years (2025)							

C. High Intensification (37.5%)					Net	Gross	
SUPPLY	Unit Potential				Resid'l	Urban	Density
Source	SF	MS	AP	Total	Ha	Ha	u/net ha
Surplus at 2011	3449	8177	12799	24424	490	534	49.8
ROPA 1 over 40K units	2470	380	950	3800	141	235	27.0
ROPA 1 other areas*	443	68	170	681	25	32	27.0
SUC over 3400 ha	11846	1823	4556	18225	676	1465	27.0
Total	18208	10447	18475	47130	1333	2266	35.4

ESTIMATED SURPLUS (DEFICIT) IN UNITS & LAND, 2011-31

	UNITS:				HECTARES:			
	SF	MS	AP	TOTAL	SF	MS	AP	TOTAL
DEMAND	23011	10732	17308	51051	1151	290	131	1572
SUPPLY	18208	10447	18475	47130	910	282	140	1333
SURPLUS (DEFICIT)	-4803	-285	1167	-3921	-240	-8	9	-239
YEARS OF SURPLUS (DEFICIT) AT 2031	-3.6 years (2027)							

ASSUMPTIONS:		SF	MS	AP	
Rural share and unit mix	12%	95%	0%	5%	
Density (u/net ha)		20	37	132	
Unit mix on vacant land:					
ROPA 1		65%	10%	25%	100%
SUC		65%	10%	25%	100%

* Special Policy Areas 1 & 5 (see text)

Note: SF = single family; MS = multiples (semis & townhouses); AP = apartments